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ADDITIONAL RESOURCES--Magazines & Newsletters

Church and Clergy Finance

Church Management: The Clergy Journal

Clergy Tax Tips

Journal of Stewardship

National Association of Church Business Administrators Ledger

Additional material from denominational resources



1. General Introduction - The purpose of this study is to...

2. Methodology - The data was collected through a series of...

3. Results and Discussion - The findings of the study are...

4. Conclusion - The study concludes that...

5. References - The following sources were consulted...

6. Appendix - The data tables are included in the appendix...

7. Notes - The following notes provide additional information...

8. Index - The index is provided for ease of reference...

9. Summary - A brief summary of the study is provided...

10. Conclusion - The study concludes that...

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19. Notes - The following notes provide additional information...

PASTOR AND PARISH - A SYSTEMS APPROACH

A Reflection

"Systems approach" is a current catch phrase denoting a popularization of computer science to living organisms, and by extension to management, administration, etc. Generally, as a person trained in medicine, I would be skeptical, at best, about this approach to the church.

However, E. Mansell Pattison does a very good job of identifying the systems operating in a church. I was particularly interested in the chapter "Functions of the Church System," especially in his identification of the church as an "artificial" system, characterized by single interactions in one sphere of life, at one time and place, involving little affective or instrumental exchange between people with few connections. Sadly, that is what church life in a large city often consists of. There is no real affective life of real people really caring and really working together. Happily, Pattison gives a basis for improving organization, which allows for more interaction and sets real goals and tasks for people, concluding that people who work and love together support both system identity and individual identity.

Pattison also identifies sub-systems in the church by functions: proclaiming, symbolizing (those things unique to this church, customs, tradition, liturgy, etc.), moralizing (and here he uses Kohlberg's stages of moral development), learning-growth, sustaining, maintaining and reparative subsystems. Utilizing Pattisons structure, it becomes easy to identify the strengths and weaknesses of a church program. For example, my church has very real strengths in proclamation, symbolization, education and even in moral training, however, we fall down in the sustaining and reparative work.

In the Chapter, "System Functions of the Shepherd", I was able to identify in his developmental stages of group interaction, a critical stage our church board is working through at present, particularly with a new pastor. If the stages

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(storming, forming, norming and performing) identify phases which a group must go through in order to arrive at functioning then we are at norming, a critical growth phase, particularly with a new pastor, and one we must go through in order to come together and work effectively in common enterprises.

I found the book helpful in identifying where we are at present -- that is its descriptive function was very much what I needed at present. I commend the series as well. I have also used Pastoral Counseling in Grief and Separation effectively in my ministry to couples breaking up, and feel that the entire series has a very practical, local parish, usefulness.

Marjorie Ragona

Ministry of Administration

Marjorie F. Ragona

Management for Your Church

period of several weeks to carry out and should be followed immediately by a goal-setting, action-planning process.

We will briefly describe the model.

Phase I: Study and Discussion

1. A series of sermons on the nature and mission of the Church with feedback discussion may open the subject. This will involve the entire congregation.
2. Special study-discussion groups may be conducted on the nature and mission of the Church, following step one or as an alternate option.

Phase II: Developing a Mission Statement

1. The administrative board members and all interested members of the congregation are invited to a series of workshop sessions or a retreat to develop a mission statement to be used as a basis for goal-setting and action-planning for future programming.
2. Divide the total group into small groups of no more than eight. *Each group* will do the following:

Session I

- a. On newsprint, list (brainstorm) the biblical images of the Church and theological concepts group members find most meaningful and relevant.
- b. Take a break, walk around and browse at other lists, return and complete your own list.
- c. Discuss and select the two images or concepts your group finds most meaningful and write them on newsprint.
- d. All groups share their two images and/or concepts and the reasons for their selection.

Session II

- a. Use the same groups, giving each

Mission Intentionality and Systems Theory

group three sheets of newsprint with separate headings (questions). They are to brainstorm responses to each question. The questions are:

- 1) What world needs and issues of society should the Christian church be concerned about today?
 - 2) What needs and concerns of this community should our church be concerned about and doing something about?
 - 3) What needs of persons in this church and living in this community should our church minister to?
- b. Take a break and scan the lists of other groups.
 - c. Each group now completes its lists and identifies the top four items on each list with an asterisk.
 - d. Share those items with other groups.

Session III

Each group places its own newsprint listings for Sessions I and II before them. After reviewing the material, draft a clear, brief statement of no more than a few sentences beginning, "The mission of our church is _____." Share the statements of each group with the total group by having them read, and then post them in the room.

Session IV

Each group elects two persons (one person if there are more than six groups) to "fishbowl" in a collaboration session to work out a single mission statement for all groups. The mission statements of *each* of the groups must be posted in plain view. Blank newsprint will be posted to work out

the single statement. The fishbowl group will sit in a circle in the center of the room with two empty chairs. Members of the original groups will sit next to one another in a larger circle surrounding the fishbowl group. Any person may move into one of the two empty chairs to ask a question or make a suggestion; he then must move out. Every fifteen minutes the collaborators from each group will go back to their original group for suggestions. The process goes on until a mission statement is agreed upon by the collaborators, checking it out with each group.

Members of the congregation should be especially urged to attend this session, to form groups of eight, and to participate in the fishbowl collaboration session. This is likely to be a long session requiring two or more hours of time, as will likely be true of each of the three other sessions.

The time structure of each session may be altered to fit the needs of the situation. The larger the number of participants, the more time the design will take. The design can be carried out at an overnight retreat or in three separate sessions.

It is also possible for organizations within the church to adapt this design to their own planning needs.

PRACTICAL USES FOR AN INTENTIONAL MISSION STATEMENT

There are those who question the value of developing a mission statement. Some feel that certain denominations moved in this direction a few years back with little effect. No doubt the same might be said about the

church's witness for peace or social justice. Nevertheless, they remain valid concerns today. Previous denominational emphasis on mission statements tended to flow from the top down to the local church, and this engendered no small degree of resentment. Much of the content material for the mission statement was also handed down. It was as though the local church was putting together a pre-fab "mission kit" with the conclusions preshaped by the hierarchy. We are proposing a search for mission on the part of each local church using only broad guidelines, with all the decision-making done in the local church. We are suggesting not a denominational but a local move toward a mission statement. Systems theory suggests that each local church has unique qualities and a unique mission.

Others have questioned whether it can be demonstrated that a specific biblical image or theological concept of the Church implicitly requires a particular structure or program or, at the other extreme, whether almost any program would be appropriate for a given concept, *e.g.*, "body of Christ" or "people of God."

In our view, it is neither wise nor necessary to try to make a case that a particular passage either requires or negates any specific church structure or organization. The value of biblical images is not in the structures they suggest but in the meaning they carry for persons about the Church's identity as to who or what the Church should be and what the Church should be doing. Our stance would be that a mission statement need not be based upon or limited to one biblical passage. Paul Minear has identified more than two hundred biblical images of Church.⁴ The wealth of available biblical material is such that, in different times and places, different images become appropriate, with changing circumstances calling for special attention. In addition, other factors also enter into developing a mission statement including tradition, doctrine, contemporary world needs, the local situation, and the presence of the Holy Spirit.

Probably the most important reason that efforts to develop mission statements in the past were not as helpful as they

Interaction of Church + Environment

Change in Gay Community:

Where are activists?

Why not in church?

Who are our constituency now?

How do we serve them?

Viewing environment from System Perspective:

1. Understand nature of systems in environment
2. Understand relationship of systems to church
3. Create effective church strategy + programs that will have desired impact on those systems.

Church Environment Interface

1. Feelings of threat + risk to any organization.
2. Church requires internal stability to survive
3. Rapid/radical change disturbs homeostasis
4. Conflict over changes result, bringing anxiety + impact on church.

Causes

Population trends, life-styles, values, mobility,

existing program

Sensors for Environmental Factors

1. Structure feedback into system.

- A. Int. self-evaluation of mission, structure, programs, leadership by participants.
- B. External evaluation from deacon. supervisors, colleagues, outsiders.
- C. Periodic data gathering from members, partic. attention to non-active members.
- D. Leaders sensitive in pers. conversation & anyone willing to offer open, honest, critical feedback.

Behavioral Signs poor attendance

1. Complaints, absence, reduced participation
2. Financial withholding, withdrawal of membership
3. Declining volunteer leadership
4. Irritating behavior
5. Inab. to attract new members
6. People turning elsewhere to have needs met.
7. Population segments (racial, eco. status, youth, aged, etc) rejecting church.

2. Participative Decision-Making Process Linking persons & many environmental systems.

CHAPTER 5

Interaction of Church and Environment

God so loved the world that he gave his only Son.

John 3:16a RSV

One of the most intriguing parables reflecting how environmental realities necessitate changes in behavior is found in Corrigan and Kaufman's "Fable" in *Why Systems Engineering*.¹

Once upon a time there were two pigs (a third one had gone into marketing and disappeared) who were faced with the problem of protecting themselves from a wolf.

One pig was an old-timer in this wolf-fending business, and he saw the problem right away—just build a house strong enough to resist the huffing and puffing he had experienced before. So the first pig built his wolf-resistant house right away out of genuine, reliable lath and plaster.

The second pig was green at this wolf business, but he was thoughtful. He decided that he would analyze the wolf problem a bit. He sat down and drew up a matrix (which, of course, is pig latin for a big blank sheet of paper) and listed the problem, analyzed the problem into components and possibilities of wolf strategies, listed the design objectives of his wolf-proof house, determined the functions that his fortress should perform, designed and built his house, and waited to see how well it worked. (He had to be an empiricist, for he had never been huffed and puffed at before.)

Interaction of Church and Environment

All this time the old-timer pig was laughing at the planner pig and vehemently declined to enter into this kind of folly. He had built wolf-proof houses before, and he had lived and prospered, hadn't he? He said to the planner pig, "If you know what you are doing, you don't have to go through all of that jazz." And with this, he went fishing, or rooting, or whatever it is that pigs do in their idle hours.

The second pig worked his system anyway, and designed for predicted contingencies.

One day the mean old wolf passed by the two houses (they both looked the same—after all, a house is just a house). He thought that a pig dinner was just what he wanted. He walked up to the first pig's house and uttered a warning to the old-timer, which was roundly rejected, as usual. With this, the wolf, instead of huffing and puffing, pulled out a sledge hammer, knocked the door down, and ate the old-timer for dinner.

Still not satiated, the wolf walked to the planner pig's house and repeated his act. Suddenly, a trap door in front of the house opened and the wolf dropped neatly into a deep, dark pit, never to be heard from again.

- Morals: 1. They are not making wolves like they used to.
2. It's hard to teach old pigs new tricks.
3. If you want to keep the wolf away from your door, you'd better plan ahead.

INTRODUCTION

If your church is or has been in a changing community, you have experienced how such an environment affects church life. The wolves huffing and puffing on the church door are indeed not what they used to be, and the changing environment produces new problems requiring new solutions. Some rural areas have seen farms grow larger, population decline, school districts close down, local stores go out of business owing to nearby shopping centers, and youth leave the community permanently after high school.

Many churches in such areas have experienced a serious decline in every area of church life. Some have become members of circuits, sharing their pastors with other

skills in becoming sensitive to relevant environmental factors and in interacting with them.

Environmental forces must be viewed from two basic perspectives:

1. Worldwide environmental changes affecting all systems and persons everywhere.
2. Specific environmental factors in a local community influencing the local church.

Church leaders need to be in touch with the overarching, worldwide societal changes. Roeber sums these changes up this way.

What are the forces that have brought about these [social changes] . . . ? Social change is the manifestation of shifts in the underlying systems of values, power, and money in society. Many interdependent influences are active: education, rapid communication, transportation, the decline of religion and of the family, increased levels of material aspiration.³

He goes on to indicate that "the direction of change is toward more personal freedom." This move toward personal freedom in society is reflected in wider choices of personal life-styles and in increased freedom and liberation for minority groups, women, and others. Organizationally, it is reflected in a strong trend toward a voluntary society, with increased freedom of participation and involvement in decision-making in educational, economic, political, religious, and even military organizations. Each church must reckon with what these changes mean as it interacts with organizations, nations, and persons. More pointedly, it must see what such changes mean for its own structuring and programming. Specific suggestions as to *how* this can be done will be developed in the following section.

BUILDING IN SENSORS TO ENVIRONMENTAL FACTORS

Clergy and lay leaders need to build sensors into the local church organization that will signal the significant

environmental changes to which it needs to be alert. This is important because "different external conditions might require different organizational characteristics and behavior patterns within the effective organizations."⁴ Appropriate responses may involve either adapting to and utilizing environmental change, or mobilizing resources to counteract the change. In any case, sensitivity to the environment is required for effective functioning.

We suggest four components of a sensing system to help keep a church (or its subsystems) alert to environmental factors affecting its functioning. These components will assist in gathering accurate and timely information about environmental change.

1. *Structure Ongoing Feedback into the System.* Every organization within a church needs continuous and accurate feedback. Honest, open, critical feedback is not likely to be forthcoming unless it is structured into the operational process. Feedback needs to include *all* the following factors:
 - a. Internal self-evaluation of mission, structure, programs, and leadership by all participants.
 - b. External evaluation from denominational supervisors, colleagues, and outsiders.
 - c. Periodic organized data-gathering from members, with particular attention to nonactive members.
 - d. Leaders being sensitive in personal conversations with anyone willing to offer open, honest, critical feedback.

Whenever feedback is received, it needs to be taken seriously, evaluated, and acted upon.

Sometimes the clearest feedback is *behavioral* in nature and may come from inside or outside the church. *Behavioral signals* include: complaints, absences, reduced participation, financial withholding, declining volunteer leadership, irritating behavior, withdrawal of membership, poor attendance, inability to attract new members, persons' turning elsewhere to have needs

met, population segments' (racial, poor, youth, etc.) rejecting the church, etc. Such feedback clearly signals a need to diagnose what is going on within the organization, and how it is relating to its various environmental systems. In summary, one means of sensing environmental changes is to build an effective feedback loop into the system.

2. *Utilize a Participative Decision-Making Process.* Another way to gain current and accurate information about environmental changes is to utilize broad participation in the decision-making processes of the church and its subsystems. Dr. Robert Duncan suggests "greater participation in decision making may increase the information processing potential . . . as well as providing more sources of feedback."⁵ Any church is likely to have a broad spectrum of every segment of society in its membership or at least in its constituency. If representatives of these groups (e.g., youth, ethnic, female, male, various vocational, age, educational level) are made members of decision-making groups, they will serve as linking persons⁶ with many environmental systems. This process should be consciously utilized to enhance the church's sensitivity to and interaction with its environmental systems. This could assist the church both in meeting the needs of its own members and in designing outreach thrusts to affect various segments of its environment.
3. *Intentionally Develop Contacts and Resources in Relation to Other Relevant Systems in the Environment.* Church leaders and members should be in communication with other systems in its environment: cultural, economic, technical, educational, and political. Being in communication with these systems will add much important information to the church and may open many doors to available resources. Specific persons in these systems need to be sought out for input regarding the church's mission and programs.

4. *Develop a Systems-Environment Matrix for the Church and Its Major Subsystems.* The environment in general is too broad for a church to relate to. Each church, therefore, must identify precisely the systems and subsystems in its environment that are affecting its own functioning. Likewise, it must identify those systems it wishes to affect and change. After identifying the specific environmental systems and subsystems that affect the functioning of the local church, relevant information for planning can be gathered and processed for affecting future changes in the church.

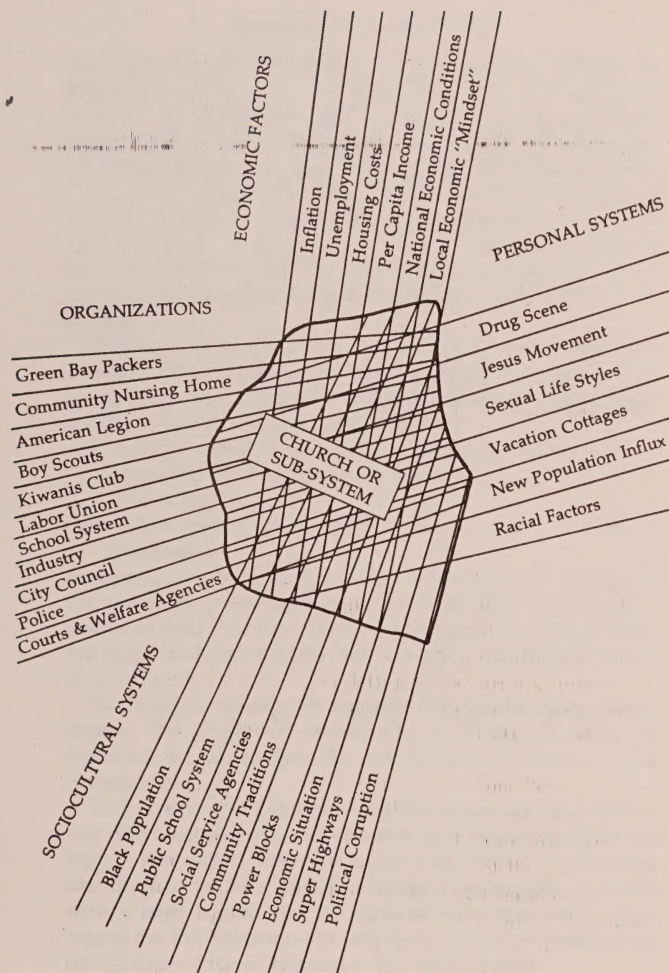
A MODEL OF THE PARISH-ENVIRONMENT INTERFACE

A diagrammatic systems model has been developed to help pinpoint the sociocultural, economic, personal, and organizational segments of the environment that most directly affect church life. The matrix form (page 70) lists the specific systems in the environment that one local church board identified as being comprised in the immediate environment of their church. You are encouraged to construct such a matrix of your church and its environment.

It is important for those using such an instrument to be as specific as possible in identifying the relevant segments of the environment. After the matrix is completed, full discussion of the perceived implications of each item will contribute much to helping the church or one of its subsystems relate to these segments of its environment.

THE IMPACT OF ENVIRONMENTAL CHANGE ON THE CHURCH

Environmental change is the prime initiator of change within most organizations. The Church is no exception. Many scholars agree we are living in a time of the most rapid,



**A DIAGRAMMATIC MATRIX
OF CHURCH-ENVIRONMENT INTERFACE**

Interaction of Church and Environment

radical, and pervasive change in history, and all indications are that this change will accelerate in the next fifty years. Alvin Toffler's well-known book *Future Shock* illustrates how rapid and anxiety-producing such changes in our society may be.

These environmental changes confront the Church with inescapable decisions. Society continuously faces new problems and circumstances. If the Church does not refocus its programs and services to meet the emerging needs of persons and society, it will soon find itself out of touch with life. No contemporary organization can ignore the pervasive recent changes identified below.

ENVIRONMENTAL CHANGES IN KEY SYSTEMS IN RECENT YEARS			
Technical	Social	Organizational	Personal
—Atomic and nuclear power —Space exploration —Computer science —Air transportation —Electronic advances —Television and communication —Medical discoveries	—Advancement of human rights —Liberation movements —Minority group power —Meaning of war —Environmental threat —Equal housing and education —Government concern for social welfare and human rights —Energy crisis —World hunger	—Rise and independence of small nations —Political shift of power —World economic structures —Educational revolution —Participative decision-making in government, industry, and education	—New life-styles —Increasing affluence —Sexual revolution —Women's liberation —Black and minority liberation —Family changes —Values changes —Individual freedom

This list is only a beginning, but there is hardly an organization or system that has not been brought to the threshold of radical decisions because of these environmental changes. Think of how some of these have affected the Church. In these times when the needs of society and

persons are in continuing flux, the Church must change its programs and outputs in order to remain relevant and effective. As a policeman said to a group standing on a street corner during a riot, "If you're gonna stand around here, you've got to keep movin'." So it is with the Church today.

To accomplish its mission, the Church must not simply respond to change, it must also initiate action to affect and influence other systems and to serve persons outside its membership. An important part of its mission is to move in on the prevailing atmosphere of rapid change with its own impact.

The view a local church holds regarding its environment in relation to its assessment of its own strength greatly affects every other part of its life. Four basic viewpoints or various combinations of them may be held:

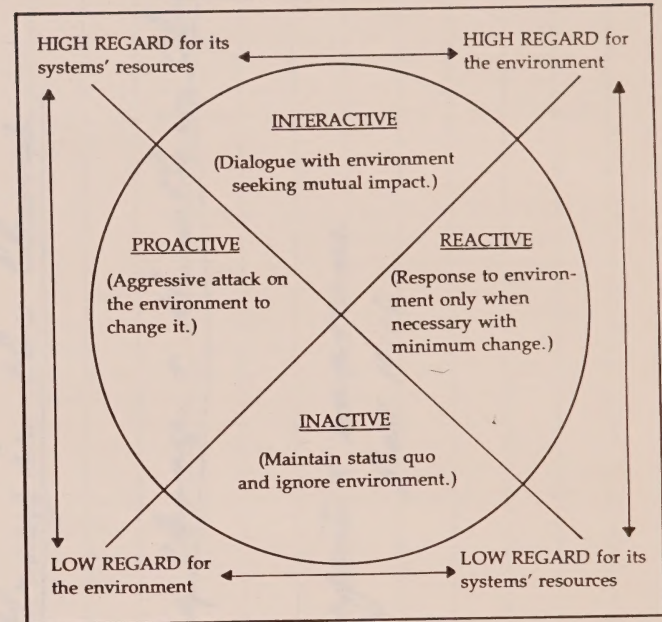
1. A high regard for its systems' resources (strengths).
2. A high regard for the environment.
3. A low regard for the environment.
4. A low regard for its systems' resources (*i.e.*, a sense of weakness).

Any particular combination of the above perspectives affects the dynamics of a church's reaction to its environment. As a matter of fact, this combination affects the leadership style, the organizational climate, and the goals and programming of the church.

The diagram on page 73, suggested by Dr. Douglas Lewis, depicts the expected interaction of a church with its environment, based upon the view it holds of itself and of its environment.

To interpret the diagram, read the response identified in any quadrant as reflecting the dynamic engendered by the high or low regard for environment and for its own resources identified at the four outside corners. For example: a church with a high regard for its systems' resources and a high regard for the environment will be expected to manifest an interactive stance in relation to the environment.

What is being suggested is that the pastor's (or group's) attitude toward the church and the environment is reflected



in the behavior described in each of the quadrants. This dynamic is also evident in the organizational climate. The leadership approach the pastor or lay leader takes reflects the quadrant one perceives himself or herself to be in. To change a church's interaction from pro-active, interactive, reactive, or inactive, a change in attitude or point of view must take place relative to the regard the church has for its environment or its organizational resources. This is an important clue for church leaders. A basic factor affecting the changing of a church's relationship to the environment is the attitude the leader and members hold about the church and its environment.

3. Intentionally develop Contacts + Resources in Relation to other Relevant Systems in Environment.

- | | |
|------------------|----------------------|
| A. Cultural | - Music, drama, etc. |
| B. Eco. | - Resources |
| C. Technological | - |
| D. Educational | - Seminaries, etc. |
| E. Political | - Politicians |
| | Gay Comm. |
| | Fem. community. |

4. Develop a Systems Environment Matrix for church + map subsystems.

Futures Planning Group in the Church
Think Tank

Matrix for initiating change + growth in Church

Be wise as serpents + innocent
as doves. Matt 10:16

A FUTURES PLANNING GROUP IN THE CHURCH

Each local church must choose to be pro-active, interactive, reactive, or inactive in a changing environment. If it waits to see what is happening in the environment by being inactive or reactive, two hazards are involved. One is that its program will be determined by the environment. The other is that the church will always be one step behind its rapidly changing environment. In contrast, the church can opt to be interactive or proactive and use its energy, resources, and personnel to shape the future. Even though this is difficult, it is possible.

It has been rightly said, "The future is hidden in our midst, but we have difficulty seeing it because we respond to the new always in terms of our *past* experience."⁷ Operating in the context of past experience tends to link us to tradition, limit our vision, build in a resistance to change, stifle creativity, and cause resistance to new ways of thinking. Too frequently, stability has meant maintaining the *status quo*. *Stability needs to be retranslated to mean reshaping the church to function in changing times so that it will continue to be a viable institution in the future.*

If the future really is hidden in our midst, how can it be uncovered? One approach that has proved helpful has been to create a futures planning group for the local church. Participants in the process should include the most knowledgeable persons in the church, and nonmembers with special knowledge in key areas of the environment. These key environmental areas for the local church should have been identified by previously developing the church-environment interface diagram illustrated on page 70.

Allow time for the future's planning group to function as a think-tank team in projecting probable future changes in key environmental areas most likely to affect the church. Following this, the group develops alternative approaches the church may initiate in relation to the predicted future directions of its environment. In pursuing its task, members of the group will need to help one another move beyond

traditional modes and thought patterns in order to develop innovative and nontraditional responses. If this process is done within the clear context of mission, it will give the church a basis for specific action planning geared toward shaping the future.

A MATRIX FOR INITIATING FUTURE CHANGE AND GROWTH IN THE CHURCH

The process described on following pages has been helpful to church groups in planning the future expansion of programs and services. This model can enable a group to move beyond traditional thought patterns and into new ways of conceptualizing programs. It has proved especially useful in stimulating responses in brainstorming sessions focusing on future programs to meet emerging needs. The model rests on the premise that change and growth result from securing the participation of present members and of new persons in new programs and services of the church.

A church experiencing an environmental crunch and desiring to expand its outreach and ministry has these options:

1. To seek new participants for its present programs and services from within its active membership.
2. To seek new participants in its present programs and services from its inactive members.
3. To modify or improve its present programs and services to make them more appealing to:
 - a. present active members.
 - b. present inactive members.
 - c. nonmembers in the community.
4. To introduce a totally new program or service designed to appeal to and meet the needs of any of the above three groups.

Obviously, initiating a totally new service or program designed to appeal to totally new persons (nonmembers) carries the greatest risk because of all the unknown factors

Management for Your Church

involved. Yet such planning may have the greatest potential for survival and growth, especially if the present programs and services are not appealing to nonmembers in the community, and if the new programs and services succeed in meeting the felt needs of this group.

Based on the material above, we have developed a matrix that has proved helpful in stimulating brainstorming responses in the future's planning groups in both rural and urban churches seeking new missional ways to respond to a changing environment. The matrix is designed to be used following the group's development of the Church-Environment Interface instrument on page 70. The two instruments together have proved to be excellent systems tools for dealing with the interaction of church and environment.

The following brief instructions will prepare you for using the instrument. The process is to move from the familiar to the unfamiliar.

1. Brainstorming

- Brainstorm programs and services for every situation indicated on the matrix. Begin with top left-hand square for present active members and move across the top row.
- Next, move to the middle row and brainstorm your way across the three columns.
- Finally, move across the lower row, thinking creatively and in totally new dimensions on how to reach and serve new persons and situations in the light of the changing environment surrounding your church. Note that the further down and to the right you move, the more unfamiliar the ideas become and the greater the risk.

2. Evaluating

Evaluation of any brainstorming suggestions should be withheld until the matrix is completed. After the brainstorming is completed, the group should evaluate the responses in the same order as listed.

MATRIX FOR CHANGE AND GROWTH IN THE PARISH

EXPANDING PROGRAMS AND SERVICES FOR MISSION			INTRODUCE TOTALLY NEW PROGRAMS AND SERVICES		
PRESENT PROGRAMS			MODIFY SERVICES & PROGRAMS		
TO REACH AND SERVE NEW PERSONS AND SITUATIONS	TO INCREASE PARTICIPATION OF INACTIVE PRESENT MEMBERS	TO PRESENT ACTIVE MEMBERS	Sunday Morning Worship.	Hold a Sermon Talk Back after Sunday Worship.	Initiate Short Term Week Night Bible Study Group.
			Hold Neighborhood Meetings to get Acquainted.	Survey Inactive Members for Change Suggestions to Meet Their Needs.	Start a church Bowling League.
			Do Sustained Lay Calling Throughout the Neighborhood.	Offer Use of Building for Community Youth Center.	Identify Specific New Groups of Persons to be Served and Get Their Suggestions.
OUTREACH	TO NEW MEMBERS	TO PRESENT MEMBERS	TO INACTIVE MEMBERS	TO SERMON TALK BACK	TO SHORT TERM NIGHT BIBLE STUDY

The Program-Planning and Budgeting System

this kind of thinking for us tonight is perhaps already becoming apparent. We can, and perhaps should, take a systems approach in conducting our church business. For example, if we were to use this same diagram to help us find a way to do more satisfactory church planning and budgeting, what do you think each of these components would be composed of?"

He then asked them to work for twenty minutes in groups of three to prepare a description of each of the components as they might pertain to a PPBS for their church. After having the time to discuss the material in small groups, the group was able, with a good deal of help from Dave, to define a PPBS as follows:

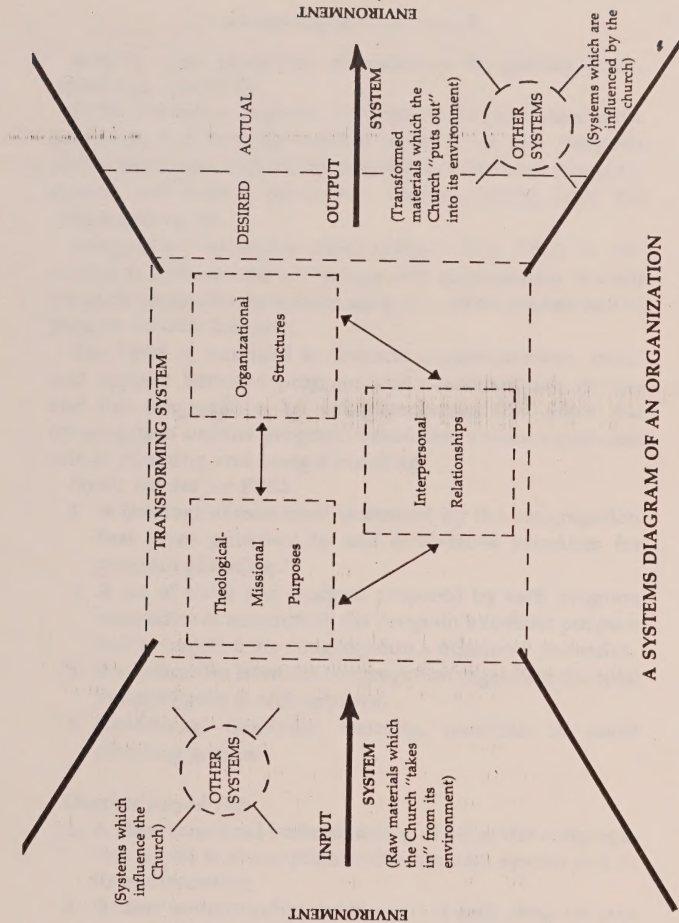
Environment of a PPBS The environment comprises those systems in a church which would be influenced by the PPBS or which would have influence upon it, and therefore would need to be involved in the planning process, such as the administrative board, council on ministries, Christian education department, Sunday school, finance committee, worship committee, building and grounds committee, missions committee, pastor-parish committee, and so forth.

Purpose of PPBS The PPBS is intended to provide a structure and process for the church as a whole and for each of its subsystems, to identify its mission or purpose, to plan ways of achieving its purpose, and to tie its budget-building process to its plans. In doing this the PPBS will focus on intergroup communication and decision-making.

Organizational Structures of PPBS

Programs: Centers of activity and/or responsibility in the church that have a specific purpose (mission) can plan to achieve their purposes and establish budgets to achieve their plans; e.g., pastor-parish committee, Sunday school, building and grounds committee, and so on.

Plans: Set of goals and objectives, with action plans to achieve them, that are put together to achieve the mission (purpose) of a program.



Management for Your Church

Budgets: The allocation of resources to specific goals, objectives, strategies.

PPBS Committee: A group responsible for coordinating the planning- and budget-building activity of the program planning groups, facilitating negotiations between planning groups and finance committee, communicating with the congregation, etc.

Interpersonal-Intergroup Relationships: The PPBS is intended to enhance the self-image and effectiveness of each program committee by encouraging it to set clear goals and to prepare its own budgets.

The PPBS is intended to increase communication, trust, and support between program and administrative groups and the congregation by using processes that allow the congregation and the program committees a more significant role in planning and budget building.

Inputs Needed for PPBS

1. A theological-missional statement by the congregation that gives guidance to and establishes priorities for program planning.⁴
2. A set of plans and budgets prepared by each program committee to accomplish the program's specific purpose and to support the congregation's missional priorities.
3. An indication from the congregation regarding the total budget figure it will approve.
4. Guidelines, timetable, training, materials to assist planning groups.

Outputs Hoped For:

1. A clear missional understanding of what the congregation hopes to accomplish within its own system and in its environment.
2. A clear understanding on the part of each program area regarding its own mission and how this relates to the work of all other programs in the church.
3. Clearly established goals and objectives for each program (plans for achieving mission).

The Program-Planning and Budgeting System

4. Carefully planned budgets for each goal, each program, and finally for the entire church program.
5. A communication/reporting process that allows the congregation to approve the budget in the light of specific program plans and objectives.

Dave turned out the lights and began the short walk to the parsonage. It had been an exciting meeting. The board had decided to implement a PPBS in the church and had appointed a PPBS committee with the responsibility of interpreting this action to the program committees and the congregation. It would be a big job, but everyone at the meeting agreed it would be worth it. A new kind of communication and planning had come to Zion.

After several meetings and much study, the PPBS committee prepared a brief descriptive statement of a PPBS, a model, and a flow chart of activities that they used in introducing the new system to the church. Their materials are presented below.

A Description of a Program Planning and Budgeting System

PPBS is a process designed to allow broader participation of the members in deciding the mission and programs of our church, and in allocating resources (money, people, etc.) to them. In seeking to broaden this participation, PPBS concentrates on gathering, organizing, and distributing useful information throughout the entire church system so that individual members and program committees may use it to construct programs and to set goals for the growth of the church and of its individual members.

PPBS will move our entire church toward decentralization.⁵ Decentralization involves placing the locus of planning and budgeting as close as possible to the congregation itself. The result of this is that:

1. Mission, programs, and budgets are decided by the congregation, or from information taken directly from the congregation.
2. Program plans and budgets are prepared by each respective program committee.

A FLOW CHART OF A PPBS FOR A LOCAL CHURCH⁶

WHO	DOES WHAT	WHEN ⁷	WHY THIS IS NECESSARY
Congregation	(a) 1. Assesses the needs and opportunities the church has for ministry to its own members and to its environment. 2. Formulates a statement of its theological-missional priorities. ⁸	March 1 - April 15	A clear indication of what the congregation sees its needs and opportunities to be, and a statement of the theological-missional priorities it wishes to pursue are the first steps in initiating a PPBS system. This statement will become the measuring stick against which all programs, plans, and budgets will be judged.
Administrative Board	1. Develops categories of the congregation's needs and opportunities for ministry. 2. Formulates broadly stated goal statements within each category which are focused upon the priorities set down by the congregation in its theological-missional statement. 3. Reports its categories and goal statements to the congregation showing how the goals, when reached, should achieve the theological-missional priorities.	April 15 - May 15	Developing the categories and goal statements forces the board to think through the "why" of program activity, to determine whether the activities are coherent with the missional priorities, and to begin the initial work of deciding the church's program for the coming year. The theological-missional statement expresses the congregation's understanding of who it is and why God has called it into existence in this particular time and place. Only the congregation, with the guidance of the Holy Spirit, can decide the crucial question of what programs and activities will best accomplish its mission. Unless the congregation does this important work,
Congregation	1. Reviews the initial work of the board and makes suggestions for revisions, deletions, or additions of goals. 2. Adopts the revised goal statements as program guidelines for the coming year.	May 15—31	it will never fully understand its purpose and calling. Whatever programs and budgets are finally developed will require the approval and support of the congregation. This activity motivates the congregation's interests and energies toward achieving the goals. People give the strongest support to programs and goals they have helped to formulate.
Administrative Board	(g) 1. Reviews the existing program structure ⁹ of the church to determine: a. Which programs now in existence are needed to continue. b. Which programs are no longer needed. c. What new programs will be needed to accomplish the missional mandate and program targets of the congregation. Appoints new program committees. 2. Assigns goal statements to each continuing or new program committee. 3. Meets with the program committees to gain their acceptance of the responsibility to achieve the goals.	June 1—15	To ensure that no ongoing program area of the church becomes trapped in activities without having any specific goals or clear-cut plans, or that any program is not directly supporting the missional priorities of the congregation. In order for the program committees to have ownership in goal statements they must fully understand the importance and comprehensiveness of the total program the board is suggesting, and they must have the opportunity to suggest modifications, additions, and so forth.

WHO	DOES WHAT	WHEN	WHY THIS IS NECESSARY
Finance Committee	1. Polls the congregation to determine a tentative amount of financial support that can be expected, based upon what the congregation now knows about the developing church program.	June 1 - 30	There are usually alternate routes (or plans) a program committee may take to achieve its goals. One important factor in deciding among the alternatives is the amount of money each alternative would require and the total amount the committees and board can reasonably expect they will have to work with.
(Each) Program Committee	(c) 1. Plans its programs for the year by establishing specific goals and objectives and developing step-by-step action plans to accomplish them. ¹⁰	June 15 - August 30	The broad goal statements formulated by the board and approved by the congregation are meant to establish direction for each program, to inform each program committee what the church hopes it will accomplish. It is now the responsibility of the committee to plan how this can best be done and to determine the budget for carrying out their plans.
	(d) 2. Prepares a budget for each goal.		
	3. Submits its program goals and budgets to the administrative board.		
	4. Submits its program budgets to the finance committee.		This process of having several committees planning the church program and budget ensures the greatest amount of wisdom and creativity being put into the planning, and generates the greatest amount of ownership in the plans. The program committees will each be most committed to the plans they have developed.

Administrative Board	1. Coordinates the program plans, removing overlaps, filling gaps, and so on, to finally arrive at a total program that is comprehensive, appealing, and focused on the missional priorities of the congregation.	September 1 - 30	The various programs must be coordinated into a total package before any judgment can be made about their overall effectiveness, and to be certain the work in each program area will enhance that of the others.
Finance Committee	1. Prepares a tentative total program budget based upon the budgets submitted by the program committees.	September 1 - 20	Two types of information will be needed for any negotiations necessary for balancing projected costs with projected income:
	2. Prepares a budget of all administration and buildings and grounds expense items not considered by the program committees.		1. How much income the church can reasonably expect to receive.
	3. Reallocates the administration and building and grounds costs to the programs to arrive at a tentative total church program budget. ¹¹		2. How much the programs, as planned, plus all other expense items, will cost.
	4. Reports to all committees and the board regarding similarities or differences between the tentative program budget and the projected income, with suggestions for bringing the two into balance.		All expenses in the church are in fact program related; money is spent in support of church programs. The two major expense items of the church are usually seen as "administration" and "building and grounds." These need to be reallocated to the programs in order to provide the congregation and the committees with a much more valid understanding of what each program is actually costing.

Following this flow chart is a budget worksheet illustrating the reallocation process. See page 98

WHO	DOES WHAT	WHEN	WHY THIS IS NECESSARY
Administrative Board	1. As is necessary, negotiates with the program committees to revise plans and budgets to affect a near balance between the total tentative budget and the projected income. 2. Submits to the congregation, for review and approval, the total tentative church program and budget, clearly showing each program area, the goals and plans for each program, the budgets for each program.	October 1 - 31	It is not necessary to arrive at a balanced budget before submitting it to the congregation. If there is too great a difference, however, the congregation will find it difficult to respond.
Congregation	(g) 1. Responds to the program plans with suggestions, asks questions for further understanding, etc. to determine the extent to which it feels the proposed program is in harmony with its felt needs and opportunities for ministry and its missional priorities.	November 1 - December 15	The congregation is soon to be asked to adopt this program and underwrite its proposed budget. It can only make these decisions in the light of how responsive it sees the program to be to the needs and interests of the congregation and its individual members.
Finance Committee and Administrative Board	1. Gains final congregation approval of the church program, and 2. Determination and authorization of the final budget.	November 1 - December 15	Any final budget amount approved by the congregation which is less than the proposed total budget will require the administrative board to negotiate with the program committees for further

Finance Committee and Administrative Board (continued)

revisions of plans to cause the proposed program budget to balance with the total budget amount authorized by the congregation.

Finance Committee

1. Develops and carries out plans needed to secure pledges to assure the financing of the budget and to support the planned programs, or to implement whatever method of securing funds it will utilize.

November 1 - December 15

(Each) Program Committee

(j)

1. Implements their program by focusing on the achievement of their goals and the missional priorities of the congregation.

January 1—
Beginning of
new program/
fiscal year

Finance Committee

(e) (i)

1. Establishes a procedure for financial accounting according to programs throughout the year.

Can be done any time prior to the beginning of the year.

Administrative Board and Finance Committee

1. Makes regular program and financial reports to the congregation, indicating the progress of each program unit in accomplishing its goals and its budget expenditures.

Having developed the total church budget programmatically, the financial accounting and reporting should be along program lines. This method of reporting will provide the congregation a new and refreshing way of looking at the financial reports and will serve to keep the total church program and its goals freshly in mind.

WHO	DOES WHAT	WHEN	WHY THIS IS NECESSARY
Administrative Board	(f) (i) 1. In communication with the program committees, plans a procedure for evaluating the effectiveness of each program area at regular intervals throughout the year.	January 1 - February 28	Evaluation is often a threatening experience, but need not be. A way of reducing its threat and increasing its benefits is to have those whose work will be evaluated to participate in planning, conducting, and reporting the evaluation.
Administrative Board	2. Conducts the evaluations and works with the program committees to provide resources, solve problems, readjust plans, and so on to ensure maximum program effectiveness.	Throughout the year	Good evaluation will provide vital information for program control and greatly improve program effectiveness. Evaluation at the end of a program is too late to do much good for that program. PPBS, when once fully established in our church, should operate on a yearly cycle, with the final program evaluation of one year providing valuable planning information for the next.

The Program-Planning and Budgeting System

REALLOCATION ILLUSTRATED

The concept of reallocation is a vital procedure in program budgeting, and one that is very little practiced in local churches. You can gain much help in this procedure by studying a beginning text in cost accounting, available at most college libraries, or by visiting an accountant or accounting professor.

Basically the steps involved in reallocation are:

1. Determining the total costs of the usual administration and building and grounds items.
2. Distributing the total building and grounds cost across the programs and administration, using whatever procedure seems most appropriate—*e.g.*, the percentage of floor space used by each program in carrying out its activities.
3. Distributing the total administration costs across the programs using whatever procedure seems most appropriate—*e.g.*, the approximate percentage of time given to each program by the pastor and staff; the approximate cost of administrative supplies used by each.

On pages 98 and 99 is an illustrated budget worksheet that has proved helpful in reallocating the building and grounds costs and the administration costs to the programs, for showing program budgets, and the line item budget. The worksheet is shown as it might appear for a typical small church.

In addition to illustrating the reallocation procedure, the worksheet illustrates the relationship and differences between a line item budget and a program budget. A careful study of the worksheet would make obvious the ways in which reallocation and program budget reporting provides much more information regarding the church's mission and ministries than does a line item budget alone.

Well, there it is—the process by which the Zion congregation launched their church into a method of planning that was successful in getting many of its committees to set goals based upon the considered interests and theological insights

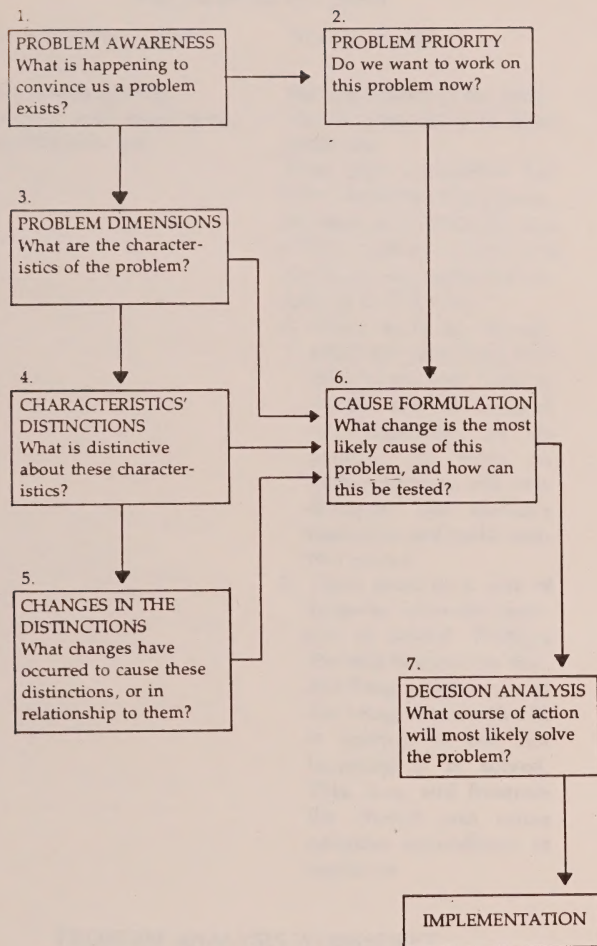
EXPENSE BUDGET

EXPENSE TYPE	TOTAL	BUILDING & GROUNDS	ADMINIS- TRATION	CHRISTIAN EDUCATION (PROGRAM 1)	WORSHIP (PROGRAM 2)
Pastor's Salary	10,000		1,000	1,000	3,000
Pastor's Benefits	2,000		200	200	600
Clerical Salaries	5,000		1,500	1,000	1,000
Clerical Benefits	500		150	100	100
Maintenance Salaries	8,000	8,000			
Maintenance Benefits	1,600	1,600			
Telephone	600		200	100	
Travel	2,000	300	300		
Office Supplies	1,000		300	200	200
Duplicating/Postage	1,000		200	100	400
Literature	800			600	
Special Events	250			200	
Utilities	4,000	4,000			
Property Insurance	1,000	1,000			
Building Maintenance	2,000	2,000			
Grounds Maintenance	1,000	1,000			
Apportionments	3,000				
SUBTOTAL	43,750	17,900	3,850	3,500	5,300
REALLOCATE BUILDINGS & GROUNDS	- 0 -	-17,900	2,000	7,000	6,000
SUBTOTAL	43,750	- 0 -	5,850	10,500	11,300
REALLOCATE ADMINISTRATION	- 0 -	- 0 -	-5,850	975	975
TOTAL	43,750	- 0 -	- 0 -	11,475	12,275
Line Item Budget		Indirect Costs: Reallocations			

OF YOUR CHURCH

MISSIONS (PROGRAM 3)	NURTURE (PROGRAM 4)	YOUTH (PROGRAM 5)	SOCIAL CONCERNS (PROGRAM 6)	(PROGRAM 7)	(PROGRAM 8)
	3,000	1,000	1,000		
	600	200	200		
	1,000	200	300		
	100	20	30		
	200		100		
	1,000	200	200		
	100	100	100		
		100	200		
		100	100		
50					
3,000					
3,050	6,000	1,920	2,230		
- 0 -	1,400	1,500	- 0 -		
3,050	7,400	3,420	2,230		
975	975	975	975		
4,025	8,375	4,395	3,205		

Program Budgets



A PROBLEM ANALYSIS MODEL

Problem Analysis

Following, we shall show the results of the analysis as Larry wrote it on the newsprint. We shall also attempt to explain the problem-solving process by making comments as we go along:

LARRY'S NEWSPRINT (The Six Steps in Problem Analysis)

STEP I: State the problem as clearly as possible.

Christ Church has 22 members ages 14-21. Only two persons in this age group are attending church, however, and neither of them is a member.

STEP II: Determine the priority of the problem.

- A. Any time pressures to solve it?
No deadlines for solving it, but we want to begin now.
- B. What will be the effects if it is not solved?
No young people in church now. A declining attendance in the future.
- C. Is the situation getting better or worse?

Our Comments

The first step in problem analysis is to recognize that a problem exists and to state it as clearly as possible.

A problem is always a deviation from some objective or desired result. The first step in problem analysis is to state as clearly as possible the desired objective and the deviation from it that is to be corrected. This deviation is the problem.

The second step in problem analysis is to decide whether you want to work on the problem, postpone it, or ignore it.

At any one time a church is experiencing more deviations from its objectives than it can possibly give attention to. Deciding to work on one problem almost always carries an implicit decision to postpone or ignore others. Deciding the importance of the problem, therefore, is a must. These three tests—time, effect, and trend—establish

Steps in Problem Analysis

Gradually getting worse, with sharp worsening this fall.

Our Comments

the importance of the problem in relationship to other problems.

Even after a problem has been established as a priority item, it should meet two criteria before any time and resources are committed to solving it. They are:

1. There must be reasonable hope of solving it. If there is no such hope, it should not be worked on, regardless of its priority. To work on such a problem will only dissipate the church's resources and make matters worse.
2. There must be a way of knowing when the problem is solved. Perhaps the only thing worse than attacking a problem and not being able to solve it, is solving it but not knowing it is solved. This, too, will frustrate the church and cause needless expenditure of resources.

PROBLEM ANALYSIS WORKSHEET

Had Larry been prepared to do a problem analysis before he came to the retreat he could have brought with him

PROBLEM ANALYSIS WORKSHEET

PROBLEM: Time: Effect: Trend: PRIORITY:

What are the DIMENSIONS of the problem?		What is DISTINCTIVE between the two categories?	What CHANGES have occurred to cause this distinction?
A. WHAT/WHO	IS INVOLVED?	IS NOT INVOLVED?	
B. WHERE	DID/DOES IT OCCUR?	DID/DOES IT NOT OCCUR?	
C. WHEN	DID/DOES IT OCCUR?	DID/DOES IT NOT OCCUR?	
D. HOW MUCH/MANY (Extent)	IS INVOLVED?	IS NOT INVOLVED?	
POSSIBLE CAUSES: (* = most likely cause)		HOW CAN MOST LIKELY CAUSE BE TESTED?	

several copies of a problem analysis worksheet for the group's use, which no doubt would have helped them organize their material. On page 109 is an illustration of such a worksheet. As we progress from this point, we shall, between each step of the analysis, indicate how the group's material might have appeared on such a worksheet.⁴

Steps in Problem Analysis

STEP III: Determine the dimensions of the problem.

A. WHAT specific group(s) IS involved?

Young people who are members of our church; high schoolers, college students, employed, single, and married, ages 14-21, who do not attend our worship services.

WHAT specific group(s) IS NOT involved?

1. The two young people who do attend the services regularly.
2. Other young people, over 21, who attend regularly.
3. Children and youth

Our Comments

The the third step in the analysis is to establish the problem's dimensions by specifying precisely what the problem IS and IS NOT, and drawing a boundary that clearly separates the problem from every other activity, issue, or group in the church.

Answering the WHAT, WHERE, WHEN, HOW BIG, and HOW MANY questions establishes the problem's dimensions and sets up its boundary showing what information is relevant and what is irrelevant to solving it. The information gathered here, and the boundary separating the deviation from all else, needs to be drawn with such precision that it exposes the change that caused the problem. An inability to identify that change, in Step VI, usually is an indication that the dimensions need to be

Steps in Problem Analysis

below 14 who do not attend Sunday school but attend worship with their parents.

B. Specifically WHERE IS the problem located?

In the Sunday morning worship services of Christ Church.

WHERE "IS NOT" this problem in our church?

1. There are 12 young people in this age group attending the Sunday afternoon youth club.
2. Many attend special worship events such as Easter, Christmas.
3. Many attend special events such as weddings.

C. Precisely WHEN DID THIS PROBLEM FIRST OCCUR?

Do not know. Has been a problem for some years.

Our Comments

drawn with more precision and the boundary more tightly.

The answers to these four questions, A, B, C, and D, say everything that can be said about the problem. This is the only relevant information needed to describe it, but remember that information is needed for both what the problem IS and what it IS NOT.

Step III is the single most important step for solving any problem. A problem clearly stated is at least 50 percent solved.

Here is the first question for which the group had no information. After a few minutes, Larry suggested they move on, with the realization that they might very well have to search out the information before any concrete clues about cause could be found.

Interestingly enough, the group soon discovered this question to be vital, and they might have been

PROBLEM ANALYSIS WORKSHEET

PROBLEM: Young people are not attending worship.

PRIORITY: Time: This is one of our most urgent problems, requiring immediate attention.
Effect:
Trend:

What are the DIMENSIONS of the problem?		What is DISTINCTIVE between the two categories?	What CHANGES have occurred to cause this distinction?
A. WHAT/WHO	IS INVOLVED?	IS NOT INVOLVED?	
	Young members, age 14-21, do not attend worship services.	1. Two who do attend 2. Young people over 21 3. Youth under 14 do not attend Sunday school.	
B. WHERE	DID/DOES IT OCCUR?	DID/DOES IT NOT OCCUR?	
	In Sunday morning worship services.	1. Sunday afternoon youth club. 2. Special worship events. 3. Other events.	
C. WHEN	DID/DOES IT OCCUR?	DID/DOES IT NOT OCCUR?	
	Don't know when first became serious. Has continued for a long time.	At other worship, social, and youth functions.	
D. HOW MUCH/MANY (Extent)	IS INVOLVED?	IS NOT INVOLVED?	
	22 members, ages 14-21, do not attend regularly.	Two young people do attend regularly.	
POSSIBLE CAUSES: (* = most likely cause)		HOW CAN MOST LIKELY CAUSE BE TESTED?	

Problem Analysis

Steps in Problem Analysis

Our Comments

Precisely WHEN does the problem now occur?
At the 10:30 A.M. Sunday worship service.
Precisely WHEN does the problem NOT occur?

At other worship, social, and youth functions.

D. Precisely HOW MANY youth ARE involved in the problem?

Twenty-two members, age 14-21, who do not attend worship regularly.

HOW OFTEN does the problem occur?

Every Sunday morning.
Precisely HOW MANY ARE NOT involved?

Two young persons who attend worship regularly.

STEP IV: Determine the distinctions between the IS and the IS NOT characteristics of the problem.

forced to search for information related to it had not the analysis succeeded in discovering the same information elsewhere.

These questions are intended to determine the extent of the problem—HOW MANY, HOW MUCH, HOW BIG, and so on.

This step involves searching out any new or different conditions, or what has changed to produce the distinctions. This is necessary since there is always one certain change,

Management for Your Church

Steps in Problem Analysis

Our Comments

A. What makes the group involved distinctively different from the other groups?

1. The non-attenders are members of our church, whereas the two young people who do attend:

—are not confirmed in our church.

—are not members of the church.

—moved into the community this summer.

2. We do not see any distinctions between the problem group and the young people over 21 years of age.

3. The children and youth under 14 who attend worship do not attend Sunday school, whereas many of the problem group attended Sun-

day school as children. These children and youth are not yet confirmed into membership, whereas all of the problem group are confirmed members.

This search for a distinction is a search for dissimilarities and is a style of thinking usually foreign to us. We have been taught to think in terms of similarity and generalizations. Problem analysis searches for distinct dissimilarities and seeks to state them with precision. This step can be greatly facilitated by being very precise and complete in Step III. The sharper the dimensions are drawn between what the problem IS and IS NOT, the fewer the distinctions that will be found. If, after Step III has been done with precision and thoroughness, the distinctions are still difficult to identify, the group has no choice but to dig in and search. A distinction is there and must be found.

Problem Analysis

Steps in Problem Analysis

Our Comments

day school as children.

These children and youth are not yet confirmed into membership, whereas all of the problem group are confirmed members.

B. What is distinctive about the WHERE of the problem?

See no distinction.

C. What is distinctive about WHEN the problem occurs?

1. It only occurs at Sunday morning worship.

2. This is the only church activity that runs concurrently with the Sunday school hour.

D. WHAT is distinctive about HOW MANY are involved?

This is our total membership between ages 14 and 21.

STEP V: Identify the changes that have occurred to produce the distinctions, or within any area of distinction.

This step, with Step VI, is aimed at finding possible causes by identifying changes in the distinctive areas that possibly could have caused the deviation. This requires

PROBLEM ANALYSIS WORKSHEET

PROBLEM: Young people are not attending worship.

PRIORITY: This is one of our most urgent problems, requiring immediate attention.
Time:
Effect:
Trend:

What are the DIMENSIONS of the problem?		What is DISTINCTIVE between the two categories?	What CHANGES have occurred to cause this distinction?
A. WHAT/WHO	IS INVOLVED?	IS NOT INVOLVED?	
	Young members, age 14-21, do not attend worship services.	1. Two who do attend 2. Young people over 21. 3. Youth under 14 do not attend Sunday school.	1. Not confirmed/members, just moved 2.
	DID/DOES IT OCCUR?	DID/DOES IT NOT OCCUR?	
B. WHERE	In Sunday morning worship services.	1. Sunday afternoon youth club. 2. Special worship events. 3. Other events.	
	DID/DOES IT OCCUR?	DID/DOES IT NOT OCCUR?	
	Don't know when first became serious. Has continued for a long time.	At other worship, social, and youth functions.	Occurs only at 10:30 A.M. Sunday worship, only activity concurrent with Sunday school hour.
C. WHEN	IS INVOLVED?	IS NOT INVOLVED?	
	22 members, ages 14-21, do not attend regularly.	Two young people do attend regularly.	Total membership, ages 14-21, involved, since two who attend regularly are not members.
	POSSIBLE CAUSES: (* = most likely cause)	HOW CAN MOST LIKELY CAUSE BE TESTED?	

Problem Analysis

Steps in Problem Analysis

Our Comments

carefully sifting through the distinctions, identifying all the changes that have taken place to cause the distinctions, or that have taken place within the distinctions.

- A1. The young members of our church, ages 14-21, have stopped attending worship.
- A2. No changes apparent.
- A3. The young people no longer attend Sunday school.
- B. No change apparent.
- C1. No change apparent.
- C2. About ten years ago the Sunday morning schedule was changed from:
—10:00 A.M. Sunday school classes, nursery through adult, and 11:00 A.M. worship for everyone

to the present schedule of:

—10:30 A.M. Sunday school for children, nursery through grade 8; morning worship for confirmees through adult.

PROBLEM ANALYSIS WORKSHEET

PROBLEM: Young people are not attending worship.

PRIORITY:

This is one of our most urgent problems, requiring immediate attention.

What are the DIMENSIONS of the problem?		What is DISTINCTIVE between the two categories?	What CHANGES have occurred to cause this distinction?
IS INVOLVED?	IS NOT INVOLVED?		
A. WHAT/WHO	Young members, age 14-21, do not attend worship services.	1. Two who do attend. 2. Young people over 21. 3. Youth under 14 do not attend Sunday school.	1. Young members don't attend church. 2. 3. Y.P. over 14 don't attend S.S.
B. WHERE	Did it occur? In Sunday morning worship services.	Did it occur? 1. Sunday afternoon youth club. 2. Special worship events. 3. Other events.	
C. WHEN	Did it occur? Don't know when first became serious. Has continued for a long time.	Did it occur? At other worship, social, and youth functions.	1. Ten years ago schedule changed from 10 A.M. S.S. & 11 A.M. worship to 10:30 A.M. S.S. & worship concurrently. These young people stopped attending church shortly after being confirmed.
D. HOW MUCH/MANY (Extent)	Is involved? 22 members, ages 14-21, do not attend regularly.	Is not involved? Two young people do attend regularly.	Total membership, ages 14-21, involved, since two who attend regularly are not members.
POSSIBLE CAUSES: (* = most likely cause)		HOW CAN MOST LIKELY CAUSE BE TESTED?	

Problem Analysis

Steps in Problem Analysis

Our Comments

D. All these young people stopped attending worship sometime (we think shortly) after being confirmed.

STEP VI: Determine which change is the most likely cause of the problem and how this may be tested for validity.

Which of the changes might possibly have caused the problem?

1. Change A1 with distinction A1—possibly something about confirmation turned them against worship.
2. Change A1 with distinction A3—possibly the Sunday school failed to instruct them regarding the importance of worship.
3. Change C with distinction C—possibly when they were in Sunday

This step actually involves three stages:

1. Identifying all the changes that might possibly have caused the problem.
2. Determining the one change that is most likely to be the cause.
3. Testing the most likely cause to see whether it did in fact cause the problem.

Any change, in order to qualify as a possible cause, must show a cause-and-effect relationship to one or more of the distinctions. Care must be given to search out all such relationships, as often the change and its cause-and-effect relationship to the problem may be so subtle and gradual that no one is aware of it.

As each possible cause is identified, it is stated in terms of a proposition to be tested.

PROBLEM ANALYSIS WORKSHEET

PROBLEM: Young people are not attending worship.

PRIORITY: Time: This is one of our most urgent problems, requiring immediate attention.
Effect:
Trend:

What are the DIMENSIONS of the problem?		What is DISTINCTIVE between the two categories?	What CHANGES have occurred to cause this distinction?
A. WHAT/WHO	IS INVOLVED?	IS NOT INVOLVED?	
	Young members, age 14-21, do not attend worship services.	1. Two who do attend. 2. Young people over 21. 3. Youth under 14 do not attend Sunday school.	1. Not confirmed members, just moved. 2. Young members don't attend church. 3. Y.P. over 14 don't attend S.S.
	DID/DOES IT OCCUR?	DID/DOES IT NOT OCCUR?	
B. WHERE	In Sunday morning worship services.	1. Sunday afternoon youth club. 2. Special worship events. 3. Other events.	
	DID/DOES IT OCCUR?	DID/DOES IT NOT OCCUR?	
C. WHEN	Don't know when first became serious. Has continued for a long time.	At other worship, social, and youth functions.	
	IS INVOLVED?	IS NOT INVOLVED?	
D. HOW MUCH/MANY (Extent)	22 members, ages 14-21, do not attend regularly.	Two young people do attend regularly.	
	POSSIBLE CAUSES: (* = most likely cause)		
1. Change A1 widest. A1—possibly confirmation turned them against worship.			
2. Change A1 widest. A3—possibly S.S. failed to instruct them in importance of worship.			
3. Change C widest. C—possibly when in S.S. they felt unwelcome in worship.			
4. Change C widest. A3 & C—possibly new schedule conditioned them to believe S.S. is more important so when they couldn't attend S.S. they quit altogether.			
		HOW CAN MOST LIKELY CAUSE BE TESTED?	
		1. Ask two who attend if they attended both as children.	
		2. Check whether non-attenders now attend S.S. elsewhere.	
		3. Ask them why they don't attend.	
		Total membership, ages 14-21, involved, since two who attend regularly are not members.	These young people stopped attending church shortly after being confirmed.
		Occurs only at 10:30 a.m. Sunday worship, only activity concurrent with Sunday school hour.	Ten years ago schedule changed from 10 a.m. S.S. & 11 a.m. worship to 10:30 a.m. S.S. & worship concurrently.

Problem Analysis

Steps in Problem Analysis

school they felt unwanted in worship.

- Change C with distinctions A3 and C—possibly the change of schedule conditioned them, as children, to believe Sunday school was more important for them than worship. So when they could no longer go to Sunday school they just quit altogether.

Which of these combinations would be MOST LIKELY to cause the problem?

Change C with distinction A3 and C.

The change of the schedule, which made it impossible for them, as children, to attend both Sunday school and worship, conditioned them to believe that Sunday school was more important. So, when they reached the age where a Sunday school was no longer provided, they quit going to church altogether or began attending another church, where there was a class available to them.

How can we test the most likely cause to see whether it

Our Comments

At this point all the changes that have been listed as possible causes are carefully analyzed to determine which one would be most likely to have caused the problem. To qualify as the most likely cause, the change must explain the distinction between the IS and IS NOT characteristics that are related to it. Would this change likely produce both sides of the problem—the IS and the IS NOT?

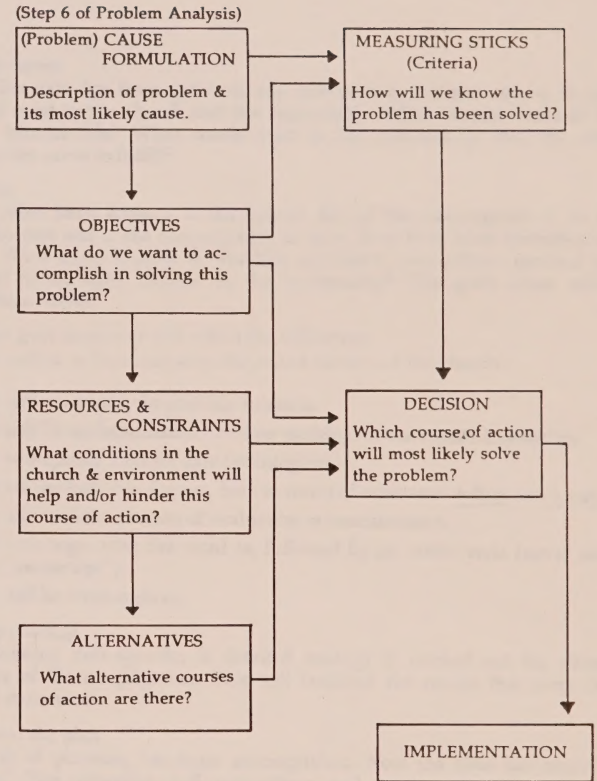
At this stage the most likely cause is treated as a proposi-

she will make hasty assumptions about the cause of the problem. Therefore, after the problem analysis, it will often be necessary to conduct a decision analysis to identify several possible courses of action and to determine the one most likely to succeed.

Many decision analyses can be conducted in a few minutes; others will need to be very thoroughly done in order to get at all the information needed to formulate action alternatives. On page 133 is a model for a decision analysis. This model is an explication of Step 7 of the model on page 106. You will note that it begins where the problem analysis leaves off, with a description of the cause of the problem.¹

Imposing this decision analysis model upon a problem in order to select a solution would require something like the following analysis.

1. Problem and Cause Formulation
 - a. How well can we describe the problem to be solved?
 - b. What is the most likely cause of this problem?
 - c. What are the theological-missional, organizational, and interpersonal aspects of this problem?
 - d. In which system component does this problem lie?
2. Objectives
 - a. What do we want to accomplish in solving this problem?
 - b. What are the specific issues that need to be confronted in meeting these objectives?
 - c. If these issues are resolved, will we know the problem has been solved?
 - 1) If *no*, continue working on problem formulation and objectives.
 - 2) If *yes*, proceed with analysis.
3. Resources and Constraints
 - a. What is there in each component of the church system that will act as a resource or constraint to meeting each of the objectives?
 - b. Can the constraints be reduced? How?
 - c. What time, facilities, and people are available for achieving the objectives?



A DECISION ANALYSIS MODEL

THE PLANNING PROCESS

While the concept of planning is motivated by both theological and practical considerations, we turn to management theory and practice for the planning process, adapting it for use in the church. The following is an outline of the steps in the planning process, with a brief description of each.

1. Formulate a mission statement

A mission statement, sometimes called a statement of purpose, identifies for the church its general mission. The statement should be inclusive enough to encompass all that the church does. Moreover, it must reflect its own "world" or context, drawing on numerous sources. The following diagram illustrates this.

What are focus? Including church



Here is an example of a mission statement:

In response to the grace of God through Jesus Christ, the mission of Lutheran Church of the Good Shepherd is to affirm, interpret, and express the Christian faith through worship, education, witness, and service.

Your congregational mission statement will, of course, be tailored to your situation.

2. Gather data

The data needed for the development of an overall plan for the church will come from two sources—the congregation itself and the community it serves. The congregation therefore conducts a *self-study*—analyzing its strengths and weaknesses, determining trends in membership, worship attendance, and stewardship; noting potential areas of need. A more sizable undertaking is the gathering of data about the community. Demographic factors, economic and political factors, and the locations and strengths of other congregations must be considered.

3. Identify needs

When the data has been gathered and interpreted, the next step is to identify the areas of need in the church and the community. What are the needs of the church for its interior life? What needs exist in the community that the congregation feasibly can serve to fulfill?

4. Set goals

Define what must happen in the interior life of the congregation if its own needs are to be met and if the congregation, in turn, is to help meet identified community needs. What must happen in worship, education, evangelism, pastoral care, stewardship? What must happen in the community? The goals when achieved will meet these needs.

A proper goal statement will reflect the following:

- It will be in harmony with the stated mission of the church.
- It will reasonably be possible to attain.
- It will be understandable to those working for the results it describes.
- It will specify a target date for completion.
- It will include cost factors, both in terms of estimated dollars and hours.
- It will include a means of evaluation or measurement.
- It will begin with the word *to*, followed by an active verb (never use "try to" or "encourage").
- It will be written down.

5. Develop strategy

Here planning gets specific. A detailed strategy is worked out for allocating the resources of the congregation. This will facilitate the results that were clarified in the goal statements.

6. Implement the plan

The work of planning has been accomplished. Now the time has come to "work the plan." The respective staff, committees, and groups proceed according to plan.

7. Set time for evaluation

Systematic and ongoing review is necessary. One way to do this is to appoint a *standing evaluation committee*, which will meet regularly to monitor progress and make recommendations for needed change.

Planning is an ongoing administrative task for organizations of all kinds. The planning done by congregations, while using procedures developed by the management sciences, is motivated and guided by theological convictions. Planning results in a more responsible use of the gifts and resources God provides.

Christ makes it possible for people to be "forward looking and forward moving, therefore revolutionizing and transforming the present." In Moltmann's words, people can "keep their heads up, recognize meaningful goals, and find the courage to invest human and material powers with this purpose."

THE PURPOSE of the ministry of Marsh Chapel:

Mode to provide stimulating ~~and~~ environment in which students, faculty, administrator and staff might join in the celebration of the Gospel, and respond by academic, cultural, aesthetic and ethical concerns from that Gospel moving out into personal and corporate involvement in the life of the community and the world.

GOAL "A" - Celebrate worship regularly in services which are interesting, inclusive, inspiring and helpful.

- Objective 1 Do planning and preparation of broad outline of services through May of 1979, topics, texts, music and special events (Easter, etc.).
- Objective 2 Coordinate choir, organist and congregational singing for optimum beauty and effectiveness.
- Objective 3 Clarify all responsibilities for all other service responsibilities such as bulletins, ushers, greeters, registration pads.
- Objective 4 Secure, list and publicize guest preachers and lecturers to be present in the chapel.
- Objective 5 Arrange instrument of systematic evaluation by various segments of chapel community, as well as interest-finder for topics and texts.

GOAL "B" - Make the ministry of the chapel visible to the campus by an effective and intensive effort to become acquainted with as many of the several constituencies as is possible.

- Objective 6 New staff should visit each dean and senior administrative official to introduce chapel program and seek support and advice.
- Objective 7 Meet in orientation sessions as time allows, and arrange for meetings in residence halls to meet and talk with students.
- Objective 8 Meet with other campus ministry personnel to share programs and goals and mutual ministry.
- Objective 9 Organize a system for regular reminder and recall of names and information concerning all persons engaged in the ministry.

GOAL "C" - Establish a systematic and effective method of responding to personal concerns and crises of campus people with special concern for coordination among existing support agencies.

- Objective 10 Arrange physical access to chapel with signs and greeters for greater accessibility.
- Objective 11 Establish a procedure for screening and referral when necessary and desirable.
- Objective 12 Work in coordination with Danielson Center, Student Health and other campus ministries for greatest effectiveness.

Objective 13 Design and begin a net-working system of care and concern with self-consciousness duties and responsibilities.

Objective 14 Keep adequate, though confidential, records and reports.

GOAL "D" - Inaugurate several program efforts to find where needs and responses are found.

Objective 15 Begin programs related to the worshipping community such as coffee hour, sermon talk-back, bible study, and traditional church-related efforts.

Objective 16 Select and implement topics and personnel for panel on significant topics of interdisciplinary concern such as bio-engineering.

Objective 17 Sponsor or respond to musical, literary or other aesthetic events of interest to the community.

Objective 18 Engage in discussion of significant issues by use of current media (films, books and t.v.) with emphasis on non-chapel locations.

GOAL "E" - Cooperate with public relations and church relations groups to publicize the ministry of the chapel throughout the campus and area.

Objective 19 Write and print brochure for immediate distribution.

Objective 20 Maintain contact with public relations and alumni office for news stories and reprints of important things happening in chapel.

Objective 21 Seek to update format of radio show for F.M. and seek possibilities of additional P.M. airing and other radio concerns.

Objective 22 Write and circulate questionnaire which will include the interests and needs of students for future programming.

GOAL "F" - Maintain or delegate administrative functions for smooth operation and relationship with other segments of the university.

Objective 23 Establish budget and finance procedures and protocols for smooth and effective operation and project of future needs.

Objective 24 Survey facilities-needs for chapel and other campus ministries, and implement in space and facilities as possible.

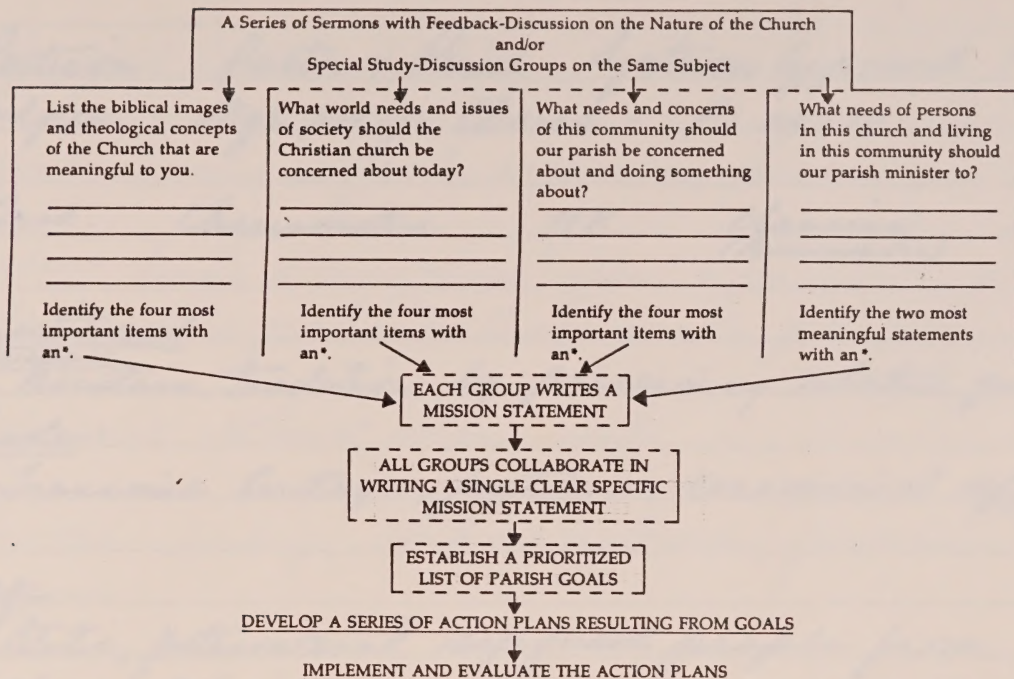
Objective 25 Establish groups within constituencies for planning and evaluation of programs and policies of the chapel.

Objective 26 Work to stimulate and encourage work and service projects with resource office for community and field experience.

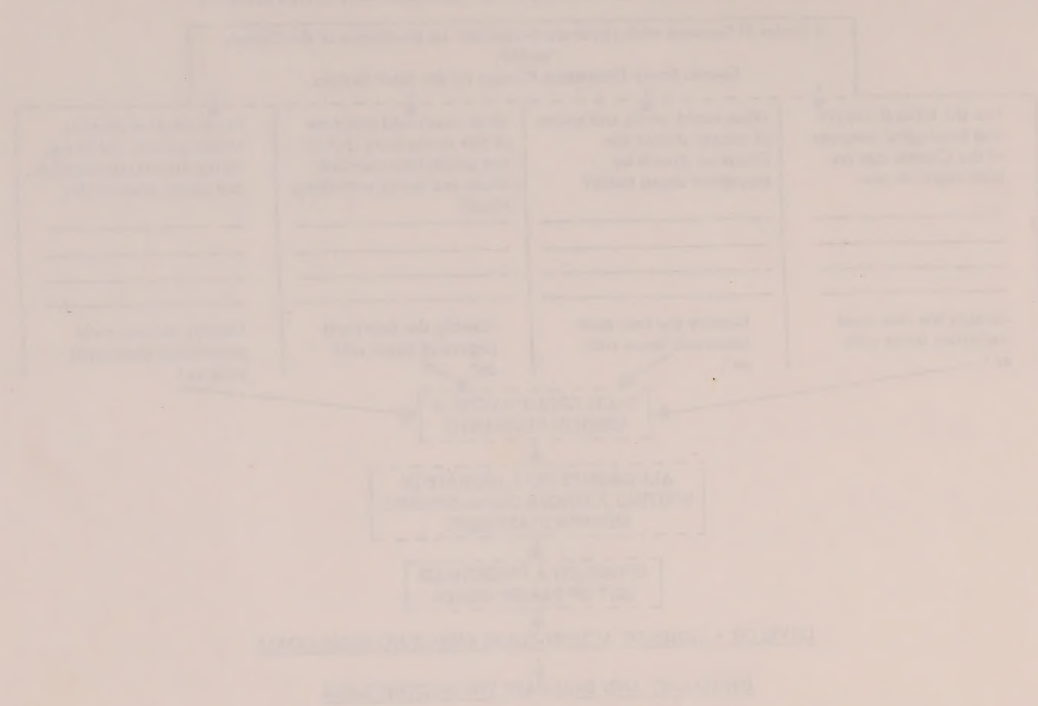
Objective 27 Continue effective eccumenical relations to enable ministries of other campus groups in their work.

note: There are 6 months. Many are interested in evaluating.
Some (notably 1, 2, 5, 13, 16, 18, 25, 26.

A PLANNING MODEL TO DEVELOP A MISSION STATEMENT



THE HISTORY OF THE UNITED STATES



Pattison Pastor + Parish - Systems Approach P 1-56
Lundgren Mgt for yr Church - P. 20-78

Iraa. Charismatic HR Classical
(bureaucratic) Systems

Traditional

Purpose

Maintain tradition by preserving status quo.

Leader:

Transmit heritage, partic. in ceremonial affairs.

Arg.

Static, patrimonial, safeguard people from change (threat to inst.)

Members

Little init, no desire for progress, little creativity.
Internal threats worse than external.

Supposedly no Church or minister - actually many.

Charismatic

Purpose

Leader - vision, instruction, call

Interpret, + proclaim; reject status quo + inspire people to join in pursuing org's mission.

Arg. Active + capable of rend. val. service

Members - need aggressive, directive leadership.

(Billy Graham, Oral Roberts, M.L. King, Tray Perry!)

Human Relations -

Purpose - Personal growth + achieve own personal goals in org.; self-worth, expression, personal goal achievement.

leader - Create atmosphere ^{to} open expression & democratic participation for all people.

Types - U.U. - Ethical Humanists

Persons: Feelings, mut. acceptance, personal goals.

Classical - Bureaucratic.

Purpose: Achieve org. goals.

People - Servants of org. - means to ↑

leader - Maintain control by enforce. rules & decisions from top.

Types: U.H.C. + R.C.

Systems

Purpose: Org. goals + pers. goals of = importance.
Org. growth + growth of people = imp.

People - Need org. + struct. to achieve personal goals; Org. needs persons to achieve group goals.

Humans habitans -
Purpos: Purposus purus - adhibere adhibere
Purpos in up: suffragis, suffragis, suffragis

Propter - Propter atropos, Propter atropos
Purposus participium propter

Typo - Typo - Typo

Purpos: Purposus, Purposus, Purposus
Purposus

Purposus - Purposus
Purposus: Purposus, Purposus

Purposus - Purposus
Purposus: Purposus, Purposus

Purposus - Purposus
Purposus: Purposus, Purposus

Typo: Typo + Typo

Purposus - Purposus
Purposus: Purposus, Purposus

Purposus - Purposus
Purposus: Purposus, Purposus

Contributions of Syst. Theory

1. Diagnostic tools for ident. problems, dynamics that cause church to behave as it does.
2. Increases effectiveness of planning process by ident. components of church + environment as resources or constraints on plan.
3. Perspective of wholeness, gestalt view of church, rarely overlooked by involvement in one partic. org. in church.
4. Predictability (more accurate) of effects + implications of alt. courses of action.
5. Systems ~~dictate~~ elicits flex. leadership behavior contingent on environment, goals + charact. of church.

Overview of Church

Comm Church - (Theoretical)

1. Poor org. of pledge campaign.
2. Hard feelings + divisions bet. members.
3. No purpose or mission.
4. No new members.
5. Inad. or unatt. facilities
6. Compet. of other activities
7. Low eco. status of commu.
8. No concern or ministry outside selves.

Management for Your Church

It was then possible for the superintendent to diagram the relationship of all these issues in order to develop a picture of the church, as on page 33.

The board decided the lack of finances was a serious problem that required immediate attention. However, the financial problems of the church would continue, and possibly worsen, until one of the possible causes on the list had been dealt with: no purpose or mission. At that point, they began making plans for:

1. Reducing some of the immediate-financial threat. (First aid for temporary relief.)
2. Involving the congregation in deciding the mission of the church and establishing goals to reach the mission. (Not first aid but sustained treatment.)

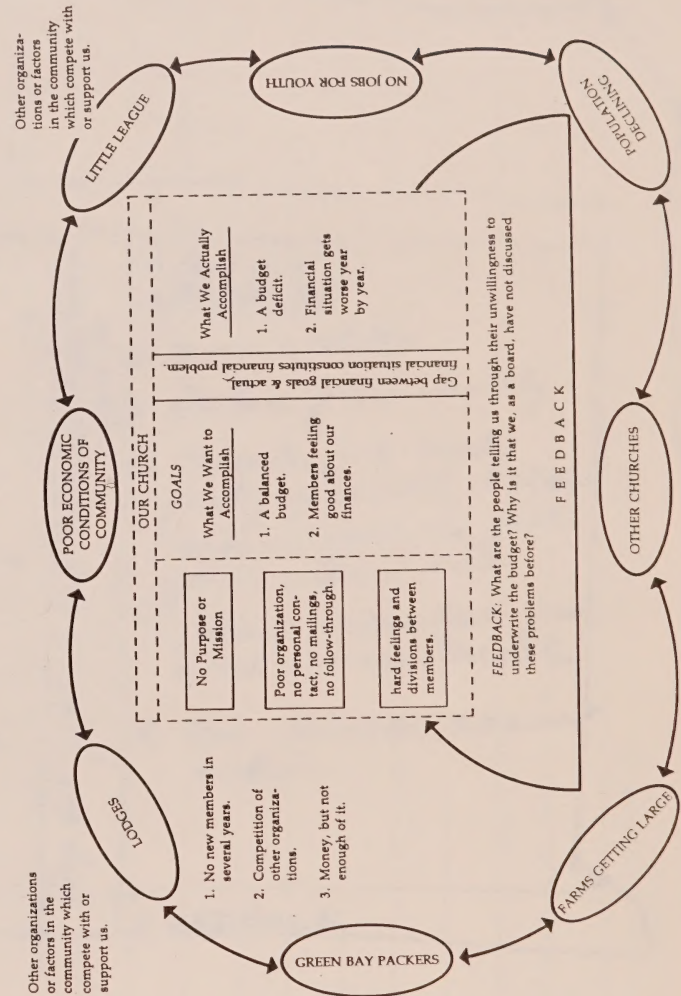
We have chosen to use this particular church situation to introduce you to systems theory because the diagnosis offered by the administrative board turned out to be systemic, that is, they looked at every important component of the church system. What is startling in this instance is that they identified some serious conditions in every component.

But what is a system, and what are its components? And how can the systems approach be utilized by church leaders? These are the questions we hope to deal with in the following chapters. We will discuss the church from the viewpoint of systems theory, introduce some systems tools that we hope you will use and find helpful, and attempt to put this all together in terms of the important function of pastoral management as an enabling ministry to help the church become more effective in fulfilling its mission and ministry.

SYSTEMS THEORY OF ORGANIZATION

An organizational system¹ is a set of components that work together to accomplish an overall objective, and that possesses a sufficient boundary to distinguish it from its environment.

If you were to ask someone to identify the components of their church, they would typically answer by identifying



other orgs. or factors in
comm. & compete
c or support us.

Dignity

Dignity

church

Goals

1. No purpose or
mission.

3. Poor org.

few people do
pers. contact,
few mailings
(mostly 2 people -
no worth segment)

3. Had feelings
that members
members

What we want
to do?

1. Grow the

2. Financial
stability

3. Members
feel good
about values

4. Members feel
good about
church

5. Social action

Gap bet. goals + actual accomplish-
ments.

What we
actually do?

1. Remain static

2. Negative financially

3. Members feel only
partly good abt. values.

Some members feel
good, others bad.

4. Some members feel
good, some terrible.

5 Not much social
action

FEEDBACK

E. C. etc.

Econom.
problems
Prop 2 1/2

lack of activity
in layday
corner

290
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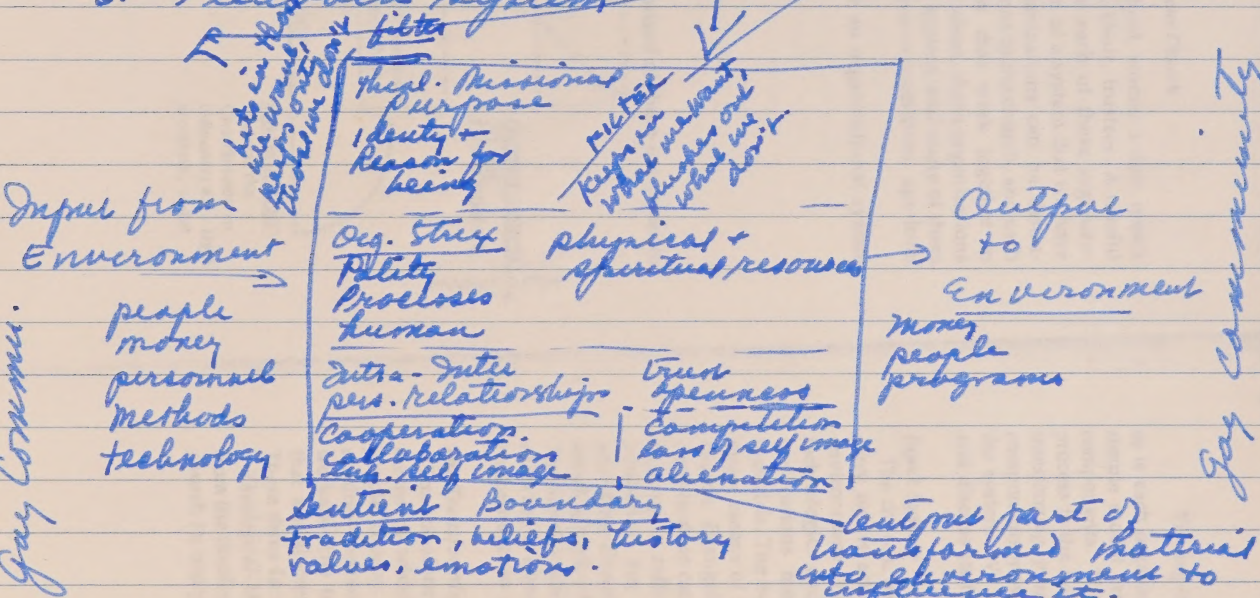
Taking a systems approach doesn't create systems, it merely allows one to think as things really are.

Org. System

1. Input
2. Trans. system
3. Output
4. Environment
5. Boundary
6. Feedback system

luke 6:38

Provide energy for main. of church & internal program.



Environment

Systems that influence
Character & behavior
of church

Feedback

Staff + memb. morale
age & sex of memb.
attend.
finance
turnover or lack of
volunteers

Keeping it all
is destructive.

Centrals part of
transformed material
into environment to
influence it.

Environment

Systems church
seeks to influence:
legal
eco
social

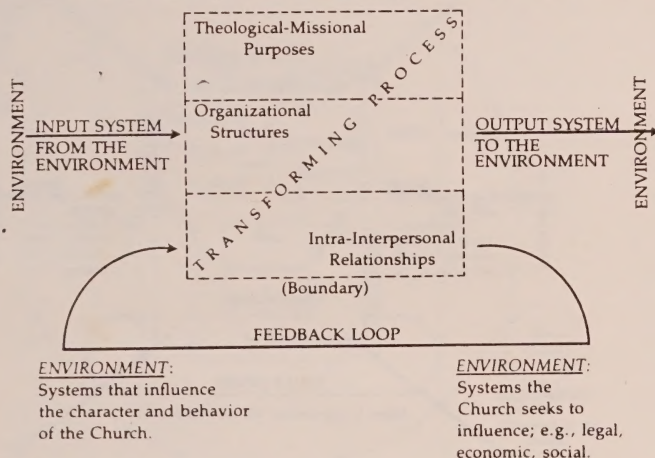
Gay Community

organizations, e.g., the Sunday school, women's club, men's club, youth group, official board, choir, trustees. A careful review, however, would indicate each of these organizations, by itself, fits the description of a system that we have given above. Each of these organizations can be distinguished from the other organizations in the church, and each has its own set of components that work together to accomplish an overall purpose. In short, these organizations are subsystems within the church system, and many of them will have subsystems of their own—committees, age-level departments, classes, and so on.

The components that comprise an organizational system are:

1. Input System
2. Transforming System
3. Output System
4. Environment
5. Boundary
6. Feedback Loop

A church, as a system, is comprised of these components,



as is each organization (subsystem) within the church. The simple model on page 34 shows the relationship of these components. This model suggests that the transforming process is the heart of the system. Systems theory holds the *transforming process* and the *environment* to be the two components most influential in determining the character of the system. We shall now describe each of the components and discuss its functional relationship to the others.

Input System

The church, like all other systems, in order to survive and carry on its activities must take in raw materials from its environment—new people, money, hired personnel, new technologies and methods, materials, and so on. Churches use various means to obtain these necessary inputs or materials. The every-member canvass is for many churches a major means of bringing in sufficient money to operate the church. Evangelistic crusades, advertising, bus ministries, door-to-door canvassing are all utilized by various churches to bring in sufficient raw materials to carry on the church's ministries. For example, one of the writers first began attending church as a result of a Sunday school contest in which a high school friend was attempting to win a camera. The Sunday school had decided to increase the effectiveness of its input system by offering prizes as a means of inspiring its members to recruit prospects.

The Transforming System

The transforming process² of a church is the totality of the means by which the church transforms its raw materials—people, money, technologies, and so forth—into its desired results—conversions, spirituality, social services, trained lay workers. The transforming process comprises three factors that are always in dynamic relationship to one another. These three factors are:

Theological-Missional Purposes These purposes issue from the theological-biblical beliefs and the values that give a church its unique *identity* and its *reason for being*. They have

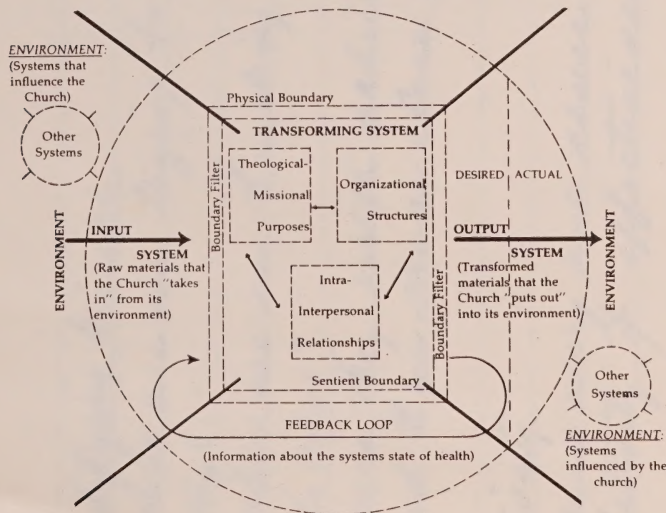
Management for Your Church

ment. In order to accomplish this, the church consumes a portion of its energy and resources in maintaining an *output system*, which exports certain resources that the church offers in ministry to people and programs beyond its own boundaries.

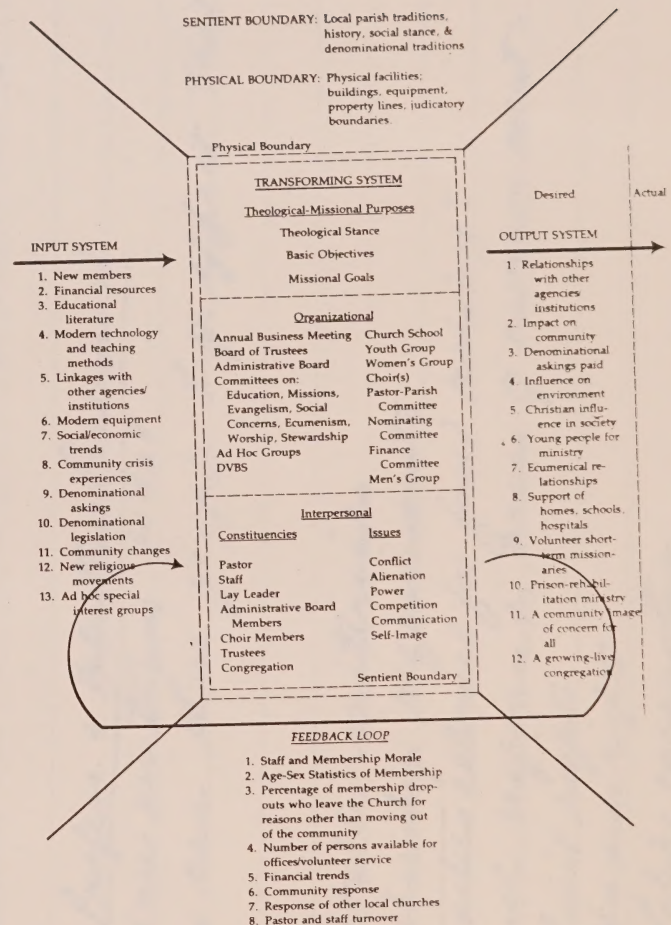
Surrounding the church system is its *environment*. Changes in the environment call for changes in the church, if it is to remain relevant and effective.

The church is located within its environment, but it possesses a sufficient *boundary* to differentiate it from all other systems. This boundary, comprising physical and sentient components, can best be understood in terms of the monitoring functions that determine its transactions and exchanges with its environment.

In many ways the church produces information that can be used to inform itself of the quantitative and qualitative



A SYSTEMS DIAGRAM OF AN ORGANIZATION



Identifying Mission

What are we trying to do?

Why?

Where are we heading?

So what?

Were they worth achieving?

Did ~~the~~ we move closer to our mission?

Activity

Must carry out sense of mission.

Activity $\neq$ effectiveness

Mission Statement - (Need shut on writing mission statement.)
(NOT GOALS)

Use of Profess. + Volunteer Personnel

What are we trying to do?

How can these people help effect that?

Input

Acceptable materials

Membership requirements

Activities allowed for fund raising?

Church response to areas of environment -

Civil rights

Human rights

Police corruption

Political stance

Today's needs do affect the *form* of Christian witness called for by today's Church.

5. *The Local Scene.* Even more specifically, a local church must identify those areas of local community and personal life to which the congregation must address itself in its ministry. The New Testament is quite clear that Jesus addressed his ministry to particular persons in specific situations. The local church must ask, To whom is our ministry and mission to be addressed?
6. *The Presence of the Holy Spirit.* God's living presence is at work today expressing itself in contemporary life. The parish must keep open to the presence of the Holy Spirit as it seeks to clarify its mission. This requires a continuous sensitivity to God's Spirit and an openness to change as situations and God's Spirit directs.

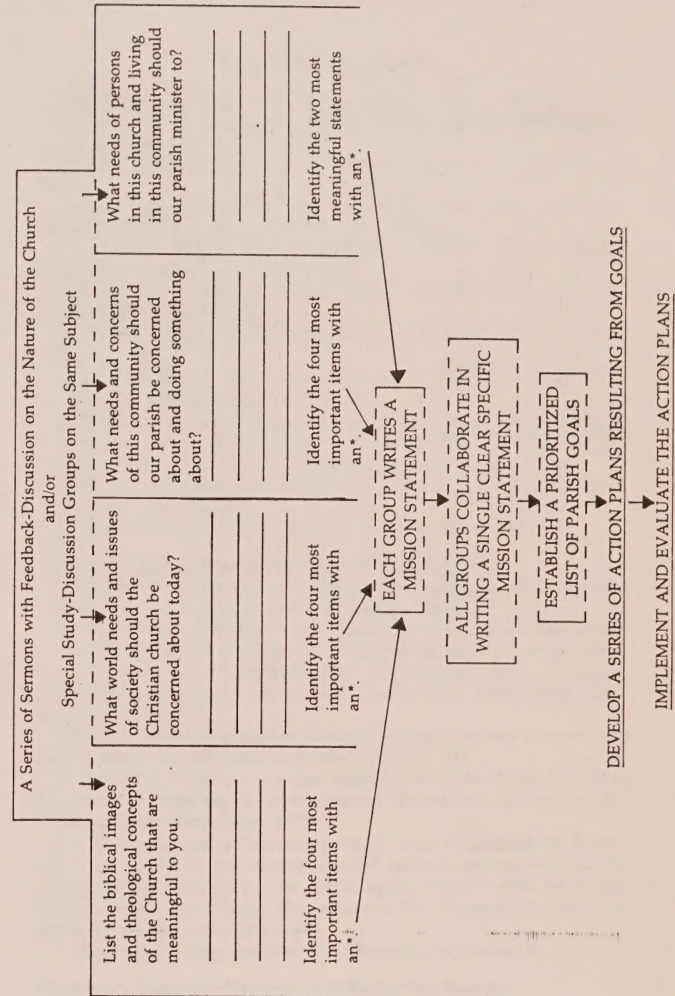
The development of a local church mission statement is essentially an answer to the question, What is the meaning of being in Christian ministry right here and right now? *Maintaining a current mission statement is an ongoing, never-ending theological activity of the local church.*

A MODEL FOR DEVELOPING A CHURCH MISSION STATEMENT

We have developed a process for preparing a congregational mission statement that is proving helpful to a large number of local churches at the time of this writing. These churches are of varying sizes and denominations. Not only are churches able to come up with clear and useful mission statements, but they report that participants are enthusiastic about the process of working out the statement. A diagram of the process is presented on the following page.

The time line for this process will vary with the number of participants. Phase one involves a serious congregational study and discussion of the nature and mission of the church that might include sermon talk-backs, small discussion groups, or a retreat. Phase two involves an overnight retreat to develop a mission statement. This design requires a

A PLANNING MODEL TO DEVELOP A MISSION STATEMENT



3. For a detailed application of each of these five theories to the church, see Peter Rudge, *Ministry and Management*.

4. For example, the Catholic Church, with one person sitting at the top of its worldwide operation, is often identified as the purest historical example of the classical theory. The United Methodist Church, however, has not one person at the top but a number of bishops, each with equal status and authority. The United Methodist Church, then, is a variation of the pure classical model. Some of the larger churches and their most famous pastors in The United Methodist Church, however, have at times espoused the charismatic leader theory—e.g., Ernest Fremont Tittle at First Church, Evanston. For those of you who may not know, Ernest Fremont Tittle was, in the 1920s and 1930s, a great charismatic proponent of the social gospel. In contrast to this, much of the social activism in local United Methodist churches in the 1960s was organized upon the human relations theory.

Chapter 3. Viewing the Church from a Systems Perspective

1. There are many systems and systems theories, such as biological, social, astrological, and so forth. In this book we are talking only about organizational systems, although much systems theory is applicable to all types of systems.

2. The term *transforming* is not to be taken here in a theological sense. All systems have a transforming process, as described in the text.

3. For a discussion of the impact of environment upon a system, see E. J. Miller and A. K. Rice, *Systems of Organization* (London: Tavistock Publications, 1967). Also see John Maurer, ed., *Readings in Organizational Theory: Open Systems Approaches* (New York: Random House, 1971).

4. A word of caution needs to be given here. The temptation to stall decision-making in order to gather more information needs to be balanced by the need for decisions to be made in order for work to get done. There comes a point in church planning when decisions must be made in spite of lack of data. This situation is made more tolerable to the persons involved if they know what is happening, and that the structure resulting from the decisions will not be carved in stone but will remain open to evaluation and alteration as new and more effective information is gathered. What is more intolerable is to make a bad decision or to create an ineffective structure and then to stick to it, come hell or high water.

Chapter 4. Mission Intentionality and Systems Theory

1. George S. Odiorne, *Management and the Activity Trap*.

2. The following resources will be helpful to those interested in pursuing a study of the nature and mission of the church:

Ernest Best, *One Body in Christ* (London: S.P.C.K., 1955).

Robert McAfee Brown, *The Significance of the Church* (Philadelphia: Westminster Press, 1956).

Howard Grimes, *The Church Redemptive* (Nashville: Abingdon, 1958).

James M. Gustafson, *Treasure in Earthen Vessels: The Church as a Human Community* (New York: Harper, 1961).

Donald G. Miller, *The Nature and Mission of the Church* (Richmond: John Knox Press, 1957).

Paul Minear, *Images of the Church in the New Testament* (Westminster Press, 1960).

H. Richard Niebuhr, *The Purpose of the Church and Its Ministry* (Harper, 1956).

Alan Richardson, *An Introduction to the Theology of the New Testament* (Harper, 1959).

D. Elton Trueblood, *The Company of the Committed* (Harper, 1961).

Hans Kung, *The Church* (New York: Sheed & Ward, 1967), and *Truthfulness, the Future of the Church* (Sneed & Ward, 1968).

Richard P. McBrien, *The Remaking of the Church* (Harper, 1973).

3. Kung, *The Church*.

4. Minear, *Images of the Church in the New Testament*.

Chapter 5. Interaction of Church and Environment

1. Robert E. Corrigan and Roger A. Kaufman, *Why Systems Engineering* (Palo Alto: Fearon Publishers, 1966).

2. *Interface* is a systems term referring to the point of interaction or contact between two systems, subsystems, groups, or persons.

3. Richard J. C. Roebert, *The Organization in a Changing Environment* (Reading, Mass.: Addison-Wesley Publishing Company, 1973), p. 155.

4. Paul R. Lawrence and Jay Lorsch, *Organization and Environment* (Homewood, Ill.: Richard D. Irwin, 1969), p. 14.

5. Robert B. Duncan, a paper entitled *Multiple Decision Making Structures in Adapting to Environmental Uncertainty* (Evanston, Ill.: Northwestern University, 1973).

6. The concept of a "linking person" was originated by Rensis Likert to apply to representatives of various subsystems in the organizational structure, but could apply equally well here. See Rensis Likert, *The Human Organization: Its Management and Value* (New York: McGraw-Hill, 1967).

7. Roebert, *The Organization in a Changing Environment*.

Chapter 6. Program Planning and Budgeting System

1. For an entire book devoted to this subject see Charles Kepner and Benjamin Tregoe, *The Rational Manager: A Systematic Approach to Problem Solving and Decision Making*.

Resources for Mission statement:

1. Bible study

Church as God working through people.
See attached Bibliography.

2. Theol. & Doctrinal concepts of Ch.

3. Tradition

4. Needs of World & Contemp. Soc.

5. Local scene

6. Presence of HS.

December 20, 1960

FAMILY INFORMATION SHEET

Family Name Cole

Husband John

ADDRESS _____

Wife Ann

Children One married daughter

Phone _____

FORMER PLACE OF RESIDENCE

1. Immediate Evanston

2. Original Iowa

3. Others

FORMER CHURCH AND DENOMINATIONAL CONNECTIONS

All Methodist - Hemenway Evanston

He was Treasurer

She was active in WWSOS

HUSBANDS OCCUPATION - Company - Special Interests

Comptroler for Lord's Dept Sotre

Both raise Barrington Terriers for show

Met at Simpson College

Wife's occupational background and special interests

Knows dogs well

Items concerning children

Was in revolt ffrom church (wanted to become Catholic)

Now married and lives in Alabama where husband (Also Meth)

works for Diamond Chemical Co.

Personal Notes

Has problem with Bertha - she is B's only friend, (age 63) but she is very dependant.

FAMILY INFORMATION SHEET

Family Name Biederer

Husband Nick

ADDRESS _____

Wife Helen

Children 16 John

14 Helen

18 Monthe David

Phone _____

FORMER PLACE OF RESIDENCE

1. Immediate Southern California
2. Original She Evanston, He Wilmette
3. Others Lived in Glenview

FORMER CHURCH AND DENOMINATIONAL CONNECTIONS

She started at First Church Evanston, (disappointed by snobbery, went to Congo in S Evanston, Disillusioned - College in and out of faith - took instruction in Mo. Synod Lutheran have tried here HE IS R.C. not-active

HUSBANDS OCCUPATION - Company - Special Interests

Runs Sinclair in Wilmette
Ran Rides for Kiddies in California

Whole family interested in Hunting

Wife's occupational background and special interests

She has been sick with last child - went to N.U.

Items concerning children

Helen wishes to start confirmation

John has not yet attended church - mother wishes him to.

Personal Notes

HOW TO PLAN FOR RESULTS

1. IDEAL SITUATION

2. CURRENT EXISTING SITUATION

3. MAJOR DIFFERENCES

4. PRIORITIES

Rate the major differences between the ideal and existing situation listed above in terms of negative impact on results.

RESOURCE PLANNING FORM

<u>Need</u>	<u>Resources Which Could Meet This Need</u>
1. They provide a strong sense of direction and purpose.	
2. They have some authority or influence over the organization.	
3. They give specific feedback to individuals about their work.	
4. They create a supportive environment where they will be satisfied.	
5. They provide a clear path for advancement to a specific job.	
6. They have authority over the organization's resources.	
7. They provide a clear path for advancement to a specific job.	
8. They provide an effective way of dealing with problems and conflicts.	
9. They establish a system of rewards and recognition.	
10. They contribute to the organization's success in a significant way.	
11. They have the ability to influence the organization's direction.	
12. They are able to influence the organization's resources.	
13. They provide a clear path for advancement to a specific job.	
14. They have the ability to influence the organization's direction.	
15. They have the ability to influence the organization's resources.	
16. They provide a clear path for advancement to a specific job.	
17. They have the ability to influence the organization's direction.	
18. They have the ability to influence the organization's resources.	
19. They provide a clear path for advancement to a specific job.	
20. They have the ability to influence the organization's direction.	
21. They have the ability to influence the organization's resources.	
22. They provide a clear path for advancement to a specific job.	
23. They have the ability to influence the organization's direction.	
24. They have the ability to influence the organization's resources.	
25. They provide a clear path for advancement to a specific job.	
26. They have the ability to influence the organization's direction.	
27. They have the ability to influence the organization's resources.	
28. They provide a clear path for advancement to a specific job.	
29. They have the ability to influence the organization's direction.	
30. They have the ability to influence the organization's resources.	

THE VALUE OF ACTION PLANS

1. They translate decisions into workable, realistic actions staff can identify with.
2. They nail down abstract ideas into concrete programs which are achievable.
3. They give specific assignments so individuals know what to do and when.
4. They create clear expectations so staff know they will be evaluated.
5. They divide responsibility for effective delegation in a simple way.
6. They build agreement by establishing mutual commitment to the plan.
7. They coordinate action and thus contribute to team-building and team-work.
8. They provide an effective follow-up mechanism by mapping future checkpoints.
9. They establish a basis for objective results measurement.
10. They contribute to accountability by identifying exactly who is accountable for what.
11. They save time by coordinating team members and translating decisions into action assignments on the spot.
12. They guide management in knowing how to support workers without over-supervising.
13. They provide a good opportunity for involvement in the planning process itself.
14. They ensure results by focusing all resources in the best possible way.

ACTION PLAN FORM

Date:

Overall Target:

Action	Whose Responsibility	Checkpoint Dates	Target Date for Completion
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			

ACTION PLANNING QUESTIONS

1. What is the overall objective and ideal situation?
2. What changes are needed in order to get from here to there?
3. What actions need to be done?
4. Who will do what, and who will be responsible for what?
5. How long will each step take and when should they be done?
6. What is the best sequence of actions?
7. How can we be sure that earlier steps will be done in time for later steps which depend on them?
8. What training is required to ensure that all staff have sufficient know-how to execute each step in the plan?
9. What minimum standards and production quotas are acceptable?
10. What level of volume or quality is desirable?
11. What resources are needed and how will we get them?
12. How will we measure results?
13. How will we follow up the plans and who should be responsible for follow-up at each step?
14. What check-points and milestones should be established?
15. What are the make/break vital steps and how can we ensure that they succeed?
16. What could conceivably go wrong and, if so, how will we get around it?
17. Who will the implementation of this plan affect and how will it affect them?
18. How can the plan be adjusted without jeopardizing its results to ensure the best response and impact?
19. How will we communicate the plan to ensure support?
20. What response to change and other human factors are anticipated and how will they be overcome?

ACTION PLAN TEST

Criteria: Does your Action Plan identify?

Check off those criteria
your Action Plan satisfies

1. Specific actions _____
2. Clear responsibilities _____
3. Realistic deadlines _____
4. Clearcut targets (performance standards
and production quotas) _____
5. Coordinated sequence of actions _____
6. A realistic and workable system _____
7. Checkpoints for routine follow-up _____
8. Reliable measurement of results _____
9. Needed personal development _____
10. Correctly emphasized priorities _____
11. Feasible contingency plans (for risky actions
or things that might go wrong) _____
12. Agreements workable for all involved _____
13. A good chance of achieving the ideal scene. _____

GROWTH INVENTORY

What Areas Are You
Satisfied In?:

Strategies to Maintain
This Level:

What Areas Would You
Like to Grow In?:

Strategies to Grow in
These Areas:

<u>What kind of man</u> <u>is he?</u>	<u>What kind of man</u> <u>is he?</u>
<u>What kind of man</u> <u>is he?</u>	<u>What kind of man</u> <u>is he?</u>

ANALYZING YOUR BOARD'S EFFECTIVENESS

Instructions: Rate your Board in each of the following areas on a 1-10 scale (10 best). They should also rate themselves. Then fill in the last column with suggestions for improving your ratings.

Role:	Rate:	Suggestions for Improvements:
1. <u>Continuity</u> - develop effective on-going leadership for organization		
2. <u>Funding</u> - developing on-going funding for organi- zation; maintain- ing organization fiscal health and growth		
3. <u>Planning</u> - setting goals and objectives for your organization. Should be done yearly, and during time set aside sole for plan- ning		

ANALYZING YOUR BOARD'S EFFECTIVENESS (cont.)

Role:	Rate:	Suggestions for Improvements:
4. <u>Policy</u> - Setting the governing principles of the organization - The broad courses of action that help you achieve your goals. Also called organization "direction"		
5. <u>Resource Allocation</u> - Also called "Program Planning". Overseeing the effective use of organization resources to fulfill plans		
6. <u>Controlling</u> - Making sure organization activities lead it to its goals. Also involves overseeing financial activities, personnel policies, and procedures		

SELF-EVALUATION CHECKLIST
FOR BOARD OF DIRECTORS/ADVISORY COMMITTEES

Name of Organization _____

Name _____ Date _____

Check all items where you feel that you would like more information.

✓	#	Item
		THE ORGANIZATION: DO I UNDERSTAND:
	1.	The stated purpose of the organization
	2.	The organizational structure
	3.	The bylaws of the organization
	4.	The policies & procedures of the organization
	5.	The goals of the organization
	6.	How the organization plans to change

THE LEGAL SIDE OF BOARD MEMBERSHIP: DO I KNOW:

	1.	What the role of the Board is
	2.	Whether it is a policy making Board
	3.	Whether it is a working Board
	4.	Whether it is an advisory Board
	5.	What my legal responsibilities are
	6.	Whether I am insured
	7.	What my liabilities are as a Board Member

THE BOARD MEMBER: DO I KNOW:

	1.	Each member of the Board
	2.	What the position of each person on the Board is
	3.	What the skills are of each Board Member
	4.	What position each Board Member holds in the community
	5.	What part each person plays in the fulfillment of the purposes of the organization
	6.	For what planning am I responsible

SELF EVALUATION CHECKLIST FOR BOARD OF DIRECTORS/ADVISORY COMMITTEES
(Contd.)

✓	#	Item
	7.	What my commitments of time and money are
	8.	For what scheduled assignments I am responsible
	9.	What are the occasional tasks for which I am responsible
	10.	To whom am I immediately responsible
	11.	Who is immediately responsible to me
	12.	For what records am I responsible

THE BUDGET: DO I:

	1.	Have a copy of the current budget for the organization
	2.	Understand the organizations budget
	3.	Know who develops, approves and administers the budget
	4.	Know if the organization keeps within its budget or has a deficient one
	5.	Know what the main revenue source is
	6.	Know what the procedures & revenue sources for capital expenditure are
	7.	Who audits the organization
	8.	If there is adequate insurance
	9.	Know what additional revenue sources are possible
	10.	Get funds for the expenses of the office/committee
	11.	Know how I am reimbursed for expenses
	12.	Know how the size of the budget is determined

FUND RAISING:

	1.	Am I responsible for donating personally to the Board
	2.	How much am I expected to contribute

SELF EVALUATION CHECKLIST FOR BOARD OF DIRECTORS/ADVISORY COMMITTEES
(Contd.)

✓	#	Item
	3.	Am I expected to participate in fund raising
	4.	In what way am I expected to participate in fund raising events
	5.	Am I expected to advocate/solicit money for the organization

TIME: DO I KNOW HOW MUCH TIME:

	1.	I am expected to give to the organization monthly/yearly
	2.	I am expected to give to Board meetings
	3.	I am expected to give to fund raising
	4.	I am expected to give to special events
	5.	I am expected to give to committees

THE STAFF: DO I KNOW:

	1.	The personnel policies and procedures
	2.	The staff organization
	3.	The director
	4.	The key staff
	5.	The volunteer co-ordinator

THE DIRECTOR: DO I KNOW:

	1.	How the Director intends to accomplish the goals of the organization this year
	2.	If the director keeps within the budget
	3.	If the director is good with personnel
	4.	If the director is a good organizer
	5.	To whom is the director specifically responsible
	6.	Whether the director works well with volunteers

SELF EVALUATION CHECKLIST FOR BOARD OF DIRECTORS/ADVISORY COMMITTEES
(Contd.)

✓	#	Item
THE VOLUNTEER: DO I KNOW:		
	1.	What the organization's policy is towards volunteers
	2.	How the volunteer program is organized
	3.	What the role of the volunteers is
	4.	If there is a volunteer co-ordinator
	5.	How many volunteers there are
	6.	The make up of the volunteers
	7.	Who recruits volunteers
	8.	What my role is in relation to the volunteer program

THE POWER STRUCTURE:

	1.	Who makes the decisions in the organization
	2.	What are the assets and who controls them
	3.	How is the system of communication structured
	4.	How is criticism handled

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20 QUESTIONS ABOUT OUR ORGANIZATION:
A Quiz for Your Board of Directors

- 1) What is the average age and income of our clients?
- 2) What service(s) do we provide our clients?
- 3) How many clients did we deal with last year?
- 4) What are some typical client opinions of our work?
- 5) How would you document the need for our service?
- 6) How many volunteers work for us?
- 7) How old are we?
- 8) What makes us unique?
- 9) What groups and prominent individuals have endorsed our work?
- 10) If we had a 50% increase in funding, what new projects would we start?
- 11) What are our main accomplishments of the last few years?
- 12) Why was this organization started?

QUESTIONS ABOUT OUR ORGANIZATION
2. What is your Board of Directors?

1) What is the average age and income of our clients?

2) What services do we provide our clients?

3) How many clients did we have last year?

4) What are some typical client opinions of our work?

5) How would you document the work for our clients?

6) How many volunteers work for us?

7) How do we raise money?

8) What makes us unique?

9) What groups and prominent individuals have endorsed our work?

10) If we had a 50% increase in funding, what new projects would we pursue?

11) What are our main accomplishments of the last five years?

12) Why was this organization created?

- 13) How would you describe the scope of our project's impact?
- 14) How would you document the qualifications of our staff to get the job done?
- 15) What do we give our donors back in return for their investment?
- 16) What is our annual budget?
- 17) Where does the money come from that supports us?
- | | |
|----------------------|---------|
| Individual donations | _____ % |
| Foundations | _____ % |
| Corporations | _____ % |
| Government | _____ % |
| United Way | _____ % |
| Other | _____ % |
- 18) How much does it cost us to provide our service per client?
- 19) Where do we plan to go for funding in the future?
- 20) How would you prove our service is successful?

Also, please make up 3 more questions about our organization you'd like the answers to during this training session.

11) How would you describe the scope of our project's impact?

12) How would you document the qualifications of our staff to

for the job?

13) What do we give our donors back in return for their investment?

14)

15) What is our annual budget?

16) What does the money come from that supports us?

Individual donors

Foundations

Corporations

Government

Voluntary

Other

17) How much does it cost us to provide our services per client?

18) What do we plan to do for funding in the future?

19) How would you prove our service is successful?

20) Please make up 3 more questions about our organization

and list the answers to during this meeting session.

SPRINGFIELD DAY NURSERY

PURPOSE OF A BOARD

I. Overview:

A Board of Directors has the legal, corporate authority and responsibility for an organizations existance, operation, stability and for provision of linkage with other organizations and parts of political and social systems.

II. Statutes - Charters and Articles of Incorporation:

In Massachusetts 501 3 (c) is required to be incorporated as a private, non-profit, non-charitable organization. Any authority to accept legal custody or guardianship of children, to provide protective services should be specifically stated in the Charter.

III. General Responsibilities of a Board:

1. Establish mission and direction of the Agency.
2. Examine the Agencies service to ensure that they agree with the mission.
3. Provide continuity and citizen participation.
4. Serve as advocate for services.
5. Selection of an Executive Director and reviews/evaluations of him/her.
6. Governs through Board policies and planning objectives.
7. Assigns priorities and reviews Agency performance.
8. Acquires resourses and finance.
9. Accounts for services and expenditures --
 - a. proper bookkeeping and auditing
 - b. sets budget
 - c. formulates policies governing grant applications
 - d. where innovative or experimental programs are desired, accepts responsibility for determining acceptable funding levels, and the conditions, strategies or policies governing the project.

IV. Board Organization:

1. Governing Boards - direct the Agency
2. Advisory Boards - fact finding or study groups
3. Auxiliary Boards - perform delegated activities (fund raising, public relations, etc.)
4. Size - usually is to 42 members
5. Reimbursement --- Can receive reimbursement for expenses incurred, but no honorarium or fee for services.

A Board members's professional business should not be involved with transactions with the Agency.

6. Qualifications --- Varied backgrounds, sexes, ages, social status, race, etc.

Most important is persons interest in work of Agency.

6. Continued -----

Other Factors:

- should present users participate?
- should honorary members exist?
- should staff be board members?
- how does staff have access to Board?

V. Characteristics of Effective Boards:

1. Diversity -- of talents, skills, experiences, backgrounds
2. Structured to insure participation
3. Involvement -- is high and uniform
4. Knowledge of Agency is universal among members
5. Rapport exists between members
6. Sensitivity of Board to constituencies and staff
7. Priorities of Board is on long range issues not trivia
8. Decisions are made and held to -- various views are expressed
9. Financial support is obtained by a reasonable number of Board members
10. Board/Executive Director work together
11. Accomplishments and achievements can be measured.

VI. ByLaws:

Should include at least:

1. Agency function and purpose
2. Membership definitions
3. Frequency of meetings, quorum (usually 1/3 + 1) attendance requirements
4. Board of Directors --
 - a. responsibilities
 - b. number of members
 - c. times of elections and process for filling unexpired terms
 - d. length of terms and conditions for re-election
 - e. statement of conflict-of-interest
5. Definitions of Advisory or Auxiliary Boards
6. Officers including enumeration, election length of term and duties
7. Definitions of Standing Committees --
 - a. Executive (usually officers of the Board and Chairpersons of Standing Committees)
 - b. Finance
 - c. Nominating
 - d. Personnel
 - e. Service or Policy or Program
 - f. Public Policy
 - g. Public Relations
 - h. Long Range Planning

8. Definition of the role of the Executive Director
9. Definition of the fiscal year
10. Indemnification statement
11. Provisions for Dissolution
12. Rules of Order
13. Statement to allow ByLaw changes

VII. Channels of Communication:

Should be established and defined between Board, Executive Director, staff, committees, etc.

VIII. Evaluation:

Usually takes place biennially and should include:

1. Determining compliance with the constitution and ByLaws and suggest modifications.
2. Analyzing attendance, participation, results of recommendations, etc.
3. Assessing financial base and controls.
4. Study quality and quantity of service.
5. Evaluating agencies effect on services and community needs.
6. Insuring that job descriptions, qualifications, salary ranges, personnel policies and practices are effective, that staff reviews are taking place, that Agency goals and objectives are realistic, that communication among staff and with the Board is easy, and that the administrative chart is current.

X. Manuals:

Usually the following manuals should exist:

1. Board Manuals
2. Service Manuals
3. Administrative Manuals

THE BOARD'S RESPONSIBILITY

In discussing the board's function, the author points up the importance of differentiating between managerial responsibilities and responsibilities for programing, financing, and interpretation.

AS SOCIAL services have become professionalized with growth of knowledge and development of skills, both professional social workers and lay boards have recognized the essential functions for which a board must be responsible. A social agency serves the community; its board members represent that community. The agency can offer only services which the community understands and supports. The board's responsibility includes establishing the basic policies of the agency and constantly re-examining and modifying those policies, interpreting the community to the agency as well as the agency to the community, and finally, carrying the major responsibility for seeing that the agency is properly financed.

This standard of board function is neither new nor revolutionary. However, since not so long ago boards were not only representatives of the community but also managers of the agency, sometimes very independent of the overall community planning or any of the staff, it is perhaps not surprising that many still maintain practices which are unsound and which impede both the board's proper functioning and the agency's work. Some boards, for example, have retained responsibility for professional decisions such as the approval of adoptive parents or the selection of a particular child for a particular family. In some institutions, boards have retained responsibility for determining which children should be admitted and which are ready for discharge. Some boards have wanted to retain responsibility for determining how much each individual parent should pay for the support of his child. All of these decisions require professional knowledge and

skill and should be arrived at with the clients. A board which continues to operate in this way deprives the agency's clients of sound casework help and depreciates the importance of the board's real functions.

Another impediment to the proper functioning of children's agencies has been in relation to the employment of personnel. Whether it be a business corporation or a social agency, the board's responsibility is to employ a competent executive and to delegate to him responsibility for employing and maintaining a qualified staff. Some boards, however, continue to carry a responsibility for the employment of other personnel—particularly fund raisers, accountants and public relations staff. In these instances, the board may have believed that, because it was responsible for public relations and financing, it was responsible for the administration of these functions, failing to see that this too is part of the responsibility of the executive. Some boards employ the physician or the psychiatrist and expect him to be responsible to them. Such a situation almost always results in divided executive authority, and results in poor morale and staff dissension.

Often the residue of direct management by the board is found in the financial area. The board may insist upon approving individual bills, or it may wish to purchase items such as clothing, office or institutional furnishings, or contract for repairs. While these may appear to be simple matters which the board member could carry and which do not require social work competence, such a view fails to take into account situations in which the decision, for example, about the purchase of clothing or cottage furnishings must be considered in the light of children's individual needs. It also invites delay and confusion and unnecessarily complicates administration.

Another not infrequent situation occurs when a building program is being started and the board or a committee takes responsibility for working directly with the architect instead of through the executive to the architect. Here again is a situation in which the layout of buildings must be determined by the nature of the

children's problems and the professional program that must be provided to meet them.

It is not to be assumed that in all these instances the board itself is responsible for this confusion. Not infrequently the executive, feeling insecure in such matters, abdicates responsibility to the board, perhaps even encouraging it, rather than learning to carry appropriately this part of his responsibility. Or, conversely, the board may recognize weaknesses in the executive and instead of facing up to whether or not an individual executive is competent to administer the agency, attempts to support him by taking on some of his functions itself. In either event, agency services are handicapped.

Every board has a vitally important function in determining policy and in understanding thoroughly the basis on which policy must rest. When it involves itself in administrative matters, the board loses its objectivity and almost always fails to discharge adequately its policy-making responsibilities. In the end the service suffers.

Therefore, it is of crucial importance that agencies review the respective responsibilities of board and administration and clearly define the functions of each. Years of experience have demonstrated amply that failure to do so injures the quality of service that is given to children. The League regards such clarification as an essential standard in measuring the quality of an agency's service. Because of this conviction, in evaluating an agency's eligibility for membership the League holds as one criterion whether the board is clear about its function, and does not carry responsibilities which should be delegated to the professional staff.

JOSEPH H. REID

THE TWO R'S—RESPONSIBILITY AND REPRESENTATION*

No staff can function effectively for long unless the board gives inspired, imaginative, careful and democratic leadership. If this is not present, the agency has but little direction and support and soon begins to flounder. This state of affairs, in turn, is reflected in the direct work with children, revealing the importance of the board's function to the total agency program. This paper discusses how the board functions and what its duties are in a children's agency.

IT IS NOT without some misgivings that I have chosen the particular phases of trustee responsibility that will be dealt with in this paper. Many of them, perhaps most of them, will seem very simple and obvious. My only defense is that the simple and the obvious are frequently overlooked, just because they are simple and obvious and not because they are unimportant. On the contrary, they are frequently more important than other things that lend themselves to more rhetorical treatment.

I would like to present these thoughts under the sub-title of "Some Commandments for Agency Trustees." Please note I said "Some Commandments," not "Ten Commandments." "Ten Commandments" connotes too much finality and infallibility. The commandments I have to suggest are simply some of those that it seems to me a conscientious agency trustee, with a proper respect for his or her job, should have in mind. I present them in all humility with the hope that they may prove thought-provoking.

Measure the Job You Undertake

When a man goes to his tailor for a suit, or a woman to her dressmaker for a gown, the first thing the tailor or dressmaker does is to take measurements. He does not start in by getting out the shears and beginning to cut up the cloth by guesswork and sewing it together as the spirit moves him. He first gets the per-

*Presented at League's meeting, National Conference of Social Work, Cleveland, Ohio, 1949.

son's measurements and then goes about his work in an orderly and systematic manner.

The same procedure is equally desirable for an agency trustee. It is easy enough to accept election to a board, start coming to meetings, listen indifferently to what goes on, ask an occasional irrelevant question, and go home with a feeling of complacent self-satisfaction, content that you have honored the organization by your presence and with a secret hope that your friends and neighbors will take due notice of your humanitarian activities. Some board members seem content to proceed in that manner and keep it up for many years. Fortunately, that species of board member is becoming more rare, and we hope will soon become extinct.

The more conscientious ones will begin at once to find out something about the job they have undertaken; some will have learned much about it before they come on the board. I would like to digress to discuss that for a moment.

In the Children's Aid Society at Buffalo we have found it advantageous to have a good many lay committees, the majority of whose members are not drawn from the board of trustees. For example, we have a Foster Home Care Committee, a Child and Parent Service Committee, a Juvenile Protection Committee, a Legislative Committee, and others. These committees meet about as frequently as the board. Just as much care, possibly more care, is taken in preparing for these meetings as for board meetings. There is always a purpose for each meeting and something worthwhile is done at each meeting. Substantial authority is delegated to these committees by the board of trustees. One of the professional staff is always present to present the problem in considerable detail. In the course of these committee meetings a great deal of instruction about the work of the society is passed along to the committee members.

As a result, membership on these committees is sought after eagerly. The members of the committees are also members of the society. It follows quite naturally that the more interested and more capable members of these committees find their way to membership on the board of trustees. Of course, these trustees have

measured the job before they come on the board; and are invariably very valuable members of it.

Now let me be a little more explicit as to just what I mean by measuring the job undertaken by an agency trustee. A trustee, in measuring his or her job, will also be seeking the answers to some questions. Here are some of those questions that occur to me:

1. What does the agency do — not generally, but in detail?
2. How important is the work of the agency?
3. How is the work of the agency done?
4. Who's who in the agency, and why?

Other questions of like tenor will occur to you.

Some of you may be saying at this point, "That is silly. Anyone would know about those things." Without intending to be contrary, I must insist that a great many do not know about them. In getting around among quite a good many social agencies I have frequently been astounded at the lack of understanding evidenced by questions asked and statements made in open meeting.

Suppose we consider these questions a little more in detail.

What does the agency do? If it happens to be a Children's Aid Society, a Family Service Society, a Y.M.C.A., a Y.W.C.A., or almost any agency you can think of, most people could tell you in a general way what the agency does. But that is not a very accurate measurement. It would be like the tailor saying, "Your chest measurement is about 30 or 40 inches." Can they tell you about all the specific services rendered by the agencies? Taking the Children's Aid Society as an illustration, can they tell you about the numberless ways in which children come to the attention of the society, the myriad of situations met in endeavoring to solve the intricate problems of child and parent relationships, about the finding and supervision of foster homes, about adoption, and a multitude of like things? Those are the things I would expect a really good trustee to find out about in answer to the question, "What does the agency do?"

Now, let's take the question, "How important is the work of the agency?" Again, painting with a broad brush, a very general answer can be given—perhaps as simply as the too frequently heard

comment, "Oh, I know somebody has to do it." But that is not the kind of an answer I am talking about.

Again, using a Children's Aid Society as an example, let me suggest that our board member reflect on the importance of caring for an abandoned child who may be a potential genius; of solving the problem that may save a home from breaking up; of protecting a child from cruelty or from influences that may lead it to moral destruction? Just how important is the work? Ask yourself the question, "How would you like to live in a community where things of that sort went uncared for?"

Without going into detail, I am sure you know what I mean by seeking answers to the questions, "How is the work of the agency done?", "Who's who in the agency, and why?"

So much for the first commandment, "Measure the job you undertake as an agency trustee."

Measure Up to the Job You Undertake

Here again I would like to be specific and suggest some of the minutiae of the work and attitudes of an agency trustee.

Attendance at Meetings: I have often wondered whether this might not be the most important responsibility of a trustee. Poorly attended meetings not only lead to lack of care in performing the ordinary board functions, but, worse still, dampen the ardor of the whole organization. Sooner or later, absence is almost certain to result in a complete functional breakdown.

On the other hand, a full attendance at meetings creates an enthusiasm and inspiration that it is almost impossible to acquire in any other manner. Any agency that can hold regular and fully attended meetings is a good bet to be an outstanding agency. There is no substitute for enthusiasm in social work, or in anything else for that matter; and attendance is a first prerequisite for enthusiasm.

Courage: Many a good cause has been lost for lack of it. It is easy enough to go along in the old accepted way, always doing exactly what people expect us to do. It takes courage to leave the beaten path and blaze a new trail, but that is the way of progress and we can have no progress without it.

Even social agencies come up against situations now and then where traditions and precedents must be ignored, if a problem is to be solved, and new methods and procedures must be adopted. The trustee, faced with such a situation, who allows his or her decision to be dictated by what people may think or by other like irrelevant considerations, rather than by a hard-headed judgment as to what is the right thing to do, is not measuring up to the job. A good trustee should highly

resolve to have the courage to decide every issue coming before the board on its merits, regardless of public censure or the criticism of friends.

No agency is likely ever to achieve any outstanding accomplishments unless it is fortunate enough to have men and women on its board of trustees who have the courage of their convictions, who are willing to lead, and who are satisfied to let time prove the soundness of their judgment.

Have a Heart: This is important in many ways. Of course, a good trustee will have a heart for the work the agency is engaged in, for the people, the children, the women, the men who receive the services of the agency. A trustee who does not have a heart filled with love and compassion for his fellows, particularly those in need, just does not belong as an agency trustee.

But it is also important to have a heart in other ways. I suggest the importance in having a heart toward the paid staff of the agency. What sort of a place do they have to work in? What sort of equipment do they have to work with? Are we expecting a professional worker, with one or more university degrees, to support a wife and family and educate his children on a meager income? Are we giving the professional members of our staff an opportunity to keep abreast of their profession by reasonable participation in professional activities outside the agency? How often have we reflected on the fact that in many of our agencies the paid workers are constantly, hour after hour and day after day, dealing with people who are not normal, who are mentally or physically ill?

Having a heart is not the least of the attributes of an agency trustee who would measure up to his job.

Be Businesslike: For some unaccountable reason, many of us forget all about our business training and business principles when we sit down with our fellow trustees in a trustees' meeting. We seem to think that this is a side activity and anything goes so long as it gets done after a fashion. In my judgment, such an attitude is inexcusable. It takes money and effort to run any kind of agency. The people who put up the money have a right to expect that it will be used to greatest advantage. The people who give of their time and talent have a right to expect at least as much. That means they have a right to expect that the agency will be a smart, smooth-functioning, businesslike organization. It means having a competent, experienced executive, adequately paid. It means a staff of workers having the requisite skills and experience, also properly paid. It means efficient mechanical aids. And it means a good place to work in. All too often a social agency is haphazardly staffed by whoever happens to be available, equipped with discarded office equipment, and housed in a shambles. Then we wonder why it does not function like a scientifically laid out, equipped and staffed office or factory. Being businesslike is also a part of measuring up to our job as agency trustees.

A word would not be out of place here about a trustee's responsibility in selecting an executive to run an agency. A failure to be business-

like about that task is unforgivable. It should be a matter of pride to all of us that social work has kept pace with business and the professions in developing a scientific approach to its problems. If Jimmie has a sore throat, grandma no longer rubs something on it out of a bottle and wraps a piece of muslin around his neck. On the contrary, we send for the doctor who prescribes some highly scientific remedy or treatment. By the same token, if Jimmie does not do well in school, we no longer take him out to the woodshed and undertake to instill an education into him by a physical application to the seat of his pants. Instead, we have his eyes examined; and, if that does not disclose the difficulty, have a complete physical examination; and then perhaps bring in the psychologist and psychiatrist.

An equal, or perhaps even greater advancement, has taken place in the field of social work, and a good agency trustee must have a thorough appreciation of that fact. The running of a social agency can no longer be left to just anyone who happens to have the time to do it. It requires a man or woman trained in the modern, scientific approach to social problems, with a background of education and experience equal to that expected of professional workers in other fields.

Measuring up to the job of agency trustee in the selection of an executive requires: (1) a full understanding of the potential of the position to be filled, measured by modern, scientific standards; and (2) a determination to accept no one for the position who is not fully equipped for it by education and experience. The task is just as important as that faced by the board of directors in filling an executive position of a comparable character in a business organization.

Distinguish Between Board and Administrative Functions

In my judgment there is nothing that creates more confusion, misunderstandings and heartaches, with eventual loss of efficiency and failure to achieve objectives, than for board members to inject themselves into the day-by-day operation of a social agency.

I realize we do not like to be considered in the same light as corporate directors. But to illustrate the point, can you imagine a director of an insurance company telling the president of the company how to organize his sales force; or a director of a bank interfering with a loaning officer in the making or refusal of a loan; or a director of a steel company trying to tell a superintendent or a foreman how to operate a furnace? Obviously, such interference on the part of a director in a business corporation would be ridiculous and, if attempted, would not be tolerated for very long.

Frankly, it is just as ridiculous in a social agency. One of the first tasks of the trustees of a social agency is to select a competent executive. Having done so, the running of the agency from then on

is the proper function of the executive, just as the running of a business corporation is the proper function of its chief executive officer.

Of course, a trustee should learn all he or she can about the work of the agency and how its work is done and who does it. This means getting acquainted with the staff and becoming generally familiar with what they do. It is all a part of measuring the job and measuring up to the job, which we have already discussed. However, in accomplishing this, the greatest care should be taken to avoid any suggestion of interference. If we, as board members, have any comments to make about the staff or how the work is done, we should make them to the chief executive; and then very sparingly.

There was a time when much of the work of social agencies was done by the officers and members. But that day is long since past, and I know of no well-run social organization today that functions in such a manner. The work in social agencies has become highly specialized, just as it has in the business world, and a good trustee will recognize that fact at all times.

A word of warning to the executives may also be in order. It is just as bad for the executive to try to take over the functions of the board, or to dictate to the board how it should act in a given instance, as it is for the board members to interfere with the executive or the staff. Either will lead to disaster sooner or later.

Mutual respect must be the order of the day. A clear-cut line must be drawn between board functions and administrative functions, and board and staff must be careful to keep on their respective sides of the line; or, if they step over, to remember to do so with proper apologies and a proper humility.

Now, suppose we discuss a few of these functions so as to see where to classify them.

Employment, Promotions, Salaries: In my judgment, these should be the exclusive prerogative of the executive, with possibly one or two provisos.

- (1) The board may properly establish wage and salary schedules, which will indicate maximum and minimum salaries in the several categories of employment.

- (2) In large organizations, perhaps the top three or four positions might be appropriate matters for discussion as between the executive and the board, with the weight of authority, however, resting with the executive.

Techniques: This is clearly the exclusive function of the staff. I can think of no exceptions. The work of the agency should be run by the staff according to methods and techniques deemed proper by them. The trustees should keep wholly out of it unless they are invited in.

Scope of Work: This is a function for the board, although in most instances I would expect the board to seek the counsel and advice of the executive. However, in giving advice, if it is asked, the executive should remember that the decision rests with the board.

Budget: This also is the exclusive function of the board, although, of course, the executive should prepare and present a tentative budget and may properly make a vigorous defense of the items in the budget, being careful that the defense is not too vigorous.

Investments — Fund Raising: These, of course, are proper board functions, except for agencies such as Community Chests. In the ordinary case, an executive charged with the operation of a social agency ought not to be expected to devote any great amount of time or energy to the financing of the agency.

Matters Having To Do With Public Relations: This is clearly a dual function. Situations which may result in public discussion or criticism are the primary responsibility of the board, in my opinion, and the executive should be prompt to bring such situations to the attention of the board, and should graciously abide by the decision of the board on them. One reason I feel that such situations are the primary responsibility of the board is that, if the executive becomes embroiled in them, the usefulness of the executive may be seriously impaired. A good board will never permit that, and will insist on bearing the brunt of the criticism rather than allowing it to fall on the executive.

However, there is a broader aspect to this question of public relations than that which may simply involve criticism of the agency or its practices. It has to do with keeping the public informed of the work of the agency. We should never lose sight of the fact, whether our agencies be of a public or a private character, that we are actually an arm of the community performing a community function, that the community supports our activities either voluntarily or through the payment of taxes, and that the community is entitled to know what we are doing.

Annual reports certainly do little to spread actual knowledge of the agencies' work throughout a community. For one thing, very few people see them, and most of those who do, do not have the time to read them. We can hardly expect people at large to find out about our work through the medium of our annual reports. Yet the people at large are entitled to know, and moreover, if we are to be of maximum usefulness to the community, they must know.

The job of informing them can only be done on a day-by-day basis.

Opportunities must be sought, maybe even created, throughout the year to get across to the people of our communities some general understanding of what we do. That, clearly, is a task for the paid personnel, and in my estimation one of the more important tasks.

Incidentally, if it is well done, the private agencies should find that the task of raising funds will become less difficult. It is pretty hard to interest people in donating money for something that they have no proper appreciation of.

Board Meetings: Please don't be surprised when I suggest that this also is a dual function. In my judgment, the principal business at nearly every board meeting should be the report of the executive and members of the staff. It is largely through the medium of such reports that board members become familiar with the work of the agency and keep in touch with it. Matters of ordinary business routine should be handled with all possible dispatch so that ample time will be available for these reports. Unless the board members are kept in reasonably close touch with the work of the agency through periodic reports from the executive and members of the staff, they cannot possibly pass intelligently on matters of policy that come before them.

If any of you think that this matter of board functions and administrative functions in a social agency is too elementary for discussion, I would only add that from what I have seen and heard of the functioning of a good many agencies, these elementary principles are more often honored in the breach than in the observance.

Keep Your Agency Young

It is a commonly overlooked fact that organizations tend to grow old just as people do, and in growing old they evidence many of the same frailties of old age that humans do. No greater compliment can be paid to a man or woman than to say that he or she has remained young. No greater compliment can be paid to an organization than the compliment that it has retained its youth.

Practically every organization starts with an idea. Some person or group of persons sees some job to be done and sets up an organization to do it. In the beginning the whole emphasis is on the job. However, as time goes on, the emphasis very frequently shifts from the job to the organization, and sometimes—more frequently than we would wish—with the passing of years the job is nearly lost sight of through exclusive concentration on keeping up the organization.

When that sort of thing happens, the organization has grown

old. Its heart is weak. Its mind is foggy. And its hands do not accomplish their task. The frailties of old age are upon it.

To keep young, an organization has only to keep alive and fresh a keen appreciation of its job—its objective. That is a task for every member of the organization and particularly one for the trustees.

If you find your agency going through motions which have become monotonous and uninteresting from long-continued repetition, if your meetings are poorly attended and evidence a lack of interest on the part of your members, if you hear doubts expressed as to whether your work is worthwhile or productive, or if you see any other evidence of stagnation or getting into a rut, I suggest that you search out the objective for which your agency was originally conceived and polish it up a bit. And after you have polished it up a bit, then ask yourself the question as to whether it is still worthwhile; and the further question as to whether you are going about the work of attaining it with a proper youthful enthusiasm and in a diligent and intelligent way.

One of the chief tasks of a board member is to keep his agency young, to keep up its enthusiasm and its interest, or, to use a sports expression, "to keep on its toes" with "its eye on the ball."

If there is anyone in this world who is entitled to our sympathy I would say it is the agency executive or the agency president who must spend most of his or her time pumping the breath of life into his organization instead of devoting his whole attention to the attainment of the objective the organization was brought into being to serve.

Visualize Your Agency As a Part of Community Social Service

In order to serve the community, agencies must cooperate with each other rather than compete. The competition I am most concerned about and the one that is the most prevalent is the competition for funds. However, sometimes competition for fields of service has proven unhealthy from the point of view of the whole community.

First, with reference to competition for funds—I once heard a senior officer of a national social service agency say, in my pres-

ence and in the presence of several others, that he was going to take every dollar he could get out of a community through the use of a highly emotional appeal regardless of whether his agency needed the money and regardless of what his campaign might do to the campaigns of the Community Chest, the Catholic Charities, the American Red Cross, and others.

It is a little difficult to reconcile that kind of an attitude with the spirit of self-sacrifice and dedication to service that prompts most people to enter the field of social service, either as a board member or in a professional capacity. Obviously, such an attitude is completely destructive of any kind of social planning by a community and cannot be tolerated.

It is unfortunate that there is so little relationship between the need for service and the emotional appeal that can be made for funds. Some organizations, serving relatively small needs that can be highly dramatized, can make almost irresistible emotional appeals for funds, while others where the need is vastly greater but lacking the emotional appeal find the raising of funds a near-impossibility.

Board members in all agencies should be cognizant of this situation and should adjust their thinking to it in a truly charitable manner. We should beware of an excess of zeal in these matters. Excessive zeal in the field of social work can prove just as destructive as excessive competition in the field of business.

No rightminded board member will advance the interests of his own organization to the detriment of other equally worthwhile organizations. If people cannot be considerate of each other in the field of charity, how in the name of heaven can we expect them to be considerate in the more worldly areas of human contact?

Let us not forget the commandment to visualize the agency on which we are privileged to serve as a part of the whole social service program for the entire community; and, while endeavoring to do our best work in our own field, yet remember that we must continually cooperate with all the other social service agencies in the community for the good of the whole community.

Have a Clear Understanding of Public and Private Social Agencies

To start with, I see the private social agency as an integral part

of the free enterprise system. It is through the private social agency that the free enterprise system gives voluntary expression to its social consciousness. It cares for those who have not won in the race of life. It sees that the youth of the nation gets off to a good start in that race. It shows an appreciation of the fact that social problems of all kinds are also economic problems.

I have not hesitated to say that many segments of business have been far too slow to recognize the importance of private social agencies as a part of the free enterprise system, and the free enterprise system has suffered because of their slowness. The private social agencies have the right to demand the support of business. They are just as much a part of free enterprise as a shoe factory, a farm, or a labor union. If the private social agency ever disappears from our American system, free enterprise will have suffered one of the sorest blows ever dealt it, and individual freedom will have suffered a blow equally severe. I am sure all of us are happy to note that this viewpoint is gaining much wider acceptance and that the support our Community Chests and individual agencies are receiving from business enterprises increases year by year.

However, a firm belief in free enterprise and the private social agencies does not in any sense rule out the public agencies. It would take an optimist of the first order to suggest that the private social agencies, supported by voluntary contributions, could carry the whole social service load today. Obviously, they cannot. The load has increased tremendously. Also, our conception of social service has broadened greatly. Public agencies have become a necessity, and I am sure all clear-thinking people recognize them as such.

I am also convinced that most people who have had contact with the public agencies will give them credit for being pretty well run. They may have some of the faults that we find in all branches of government service. They may not be as careful of the dollar as an astute businessman would like. They may have other faults, sometimes characterized under the head of bureaucracy, but, by and large, they are unquestionably acceptable to the American people and where there are faults the effort should be to correct and improve and not to destroy. I have no quarrel with our friends in the

public agencies—except possibly one that I will mention briefly in a moment.

The relationship between the public and private agencies, in my judgment, should be that of very close partners in a common enterprise. There is a place for each—a very necessary place for each. I hope that neither will ever wholly replace the other. And that is the one quarrel with the public agencies I mentioned a moment ago as being a possibility—one which I am sure all of us hope never materializes. If the public agencies ever try to take over the whole field, then I will quarrel. I will quarrel even harder if the private agencies ever seem prone to abdicate in favor of the public agencies. A sound social order needs both.

There is no doubt that the public agency is better adapted to carrying the heavy load in some fields such as the relief field. That load is greatest when the private agency faces the most difficulty in raising funds. The private agencies would find it a near or actual impossibility to extend their coverage to meet the increased load in times of distress. It seems to me that is a job for the public agencies, and surely none of us should have any quarrel with it.

On the other hand, I think the private agency may be better adapted to do the work of blazing new trails in the field of social service, and in general (there may be exceptions, of course) I suggest that the public agencies would do well to leave the blazing of new trails in social work to the private agencies.

There are some sound reasons for this suggestion. Among the first I would mention is the need that public education as to the desirability of the service should run parallel with the service's development. The private agency, with its lay board, its committees, and its funds raised by voluntary contributions, is in a much more strategic position to win public approval than is the public agency run with tax money and through public officials. Regardless of merit, the public agency might easily find itself having to cope with widespread public disapproval that would never have developed in the case of the private agency.

Another is the fact, (and although it may be denied, I am still sure it is a fact), that the private agency is much freer from undesirable pressures and influences that may be a handicap in its

work than is the public agency. Assuming that the private agency has the kind of trustees that it ought to have, the professional workers in the private agency can be protected from these pressures and influences. The professional workers in the public agencies have no such protection.

Without being too dogmatic about it and recognizing that conditions in the many thousands of communities throughout the nation vary widely, I would suggest that the following principles should govern the relationship between the private and public social agencies:

1. Each should remember at all times that their relationship is that of friends and co-workers in a common field; and, as such, they should endeavor always to cooperate and never to compete. The law requires the highest standard of good faith and fair dealing to be maintained between partners in business enterprises. It is not too much to expect that the same standard be maintained between public and private agencies in the field of social service. No set of arbitrary rules can be laid down governing the relationships between the two groups of agencies that will furnish an automatic solution to all problems. The proper solution is bound to vary depending on a multitude of circumstances that are not uniform as between agencies and in the different parts of the country. However, if a solution is sought in an atmosphere of good will, it will be more certain of satisfactory attainment.
2. The private agency will place primary emphasis on standards and will do so much of the work in the field as its funds will permit, consistent with the maintenance of high work standards.
3. The public agency will place primary emphasis on coverage and will maintain the highest work standard it finds possible, consistent with getting full coverage in the field.

Do Not Forget to Resign

Regardless of what you may think of the rest of the paper, I expect that some—especially agency presidents and executives who have not had the opportunity to bring a new face into their boards since they can remember—will applaud this.

Obviously, this is something for the conscience of the individual board member. It is pretty hard to ask anyone to resign from a board. In fact, it is most extraordinary for conditions to arise where asking for a resignation might not do more harm than the resignation would do good. Each board member must decide for himself or herself when the time has arrived to step down and

give someone else a chance. I would like to suggest some of the considerations that should be weighed in making that decision.

1. Regardless of the ability of the individual members of a board, a reasonable rotation bringing in new personalities and new viewpoints tends to stimulate interest, create enthusiasm, and keep the agency young. A time always comes when a group of even brilliant individuals becomes bored with each other. Everyone knows exactly what everyone else's reaction is going to be on every proposition. The last new idea was brought up a decade or two back. A new face would be refreshing even if it were that of an ogre. A new idea would be welcomed with a college cheer.

Resignation causes no stigma. It is no sign of approaching senility if it is done in time. It gives no suggestion of not being wanted. It is an entirely normal process—a process akin to the regeneration that takes place in nature with the passing seasons. Agency boards need that kind of seasonal regeneration just as much as petunias and dandelions.

2. Boards should be reasonably representative of the communities they serve. Our communities are changing constantly, and if the boards are to be truly representative, they must change too.

No one has a divine right to sit on an agency board. Making a contribution to the agency—even a large one—ought to give no such right. Neither should leadership in any social, economic, racial, or other group in the community entitle a person *ipso facto* to board membership. The one and only qualification is the ability to make a real contribution to the work of the agency. Granted that qualification, the board should be just as representative of the community as it is possible to make it. Also, if all groups cannot be represented at one time (and they usually cannot), a policy of fair rotation should be followed. But again I would emphasize that in pursuing a policy of broad representation and rotation on agency boards, we must never forget the basic qualification—that the individual selected must be able to make a real contribution to the work of the agency.

3. A reasonable turnover in board membership avoids any suggestion of proprietorship in the agency, or of a clique being in control of it.

Such control is disastrous to any agency, especially if it is necessary to make an appeal for funds. People are not enthusiastic about supporting any organization or movement if they feel some individual or clique is asserting a proprietary interest in it, or is generally dominating its affairs. That sort of thing seems to counter to our deep-rooted democratic interests to be acceptable to Americans. We must not only avoid it as we would the plague, but avoid also even the suspicion of it.

Nothing can better prevent the arousing of such suspicions than pursuing a policy of rotation in board membership on a broad representative basis, and by making reasonably frequent changes in officer personnel. And, of course, in changing officer personnel a deliberate effort should be made to cut across group lines, provided the proper material is available.

There are other reasons, of course. However, I hope I have said enough to cause board members to at least reflect now and then on the commandment—Do not forget to resign.

GEORGE NEWBURY

4 weeks

Sept. 1981

Oct. 1980 — Sept. 30, 1981

Income	Actual	Budget	Variance	Actual	Budget	Variance
Pledged	741 00	780 00	39 -	9103 00	10140 00	1037 00
Unpledged	567 28	360 00	207 28*	4053 54	4680 00	626 46
Fund Rais	-0-	-0-	-0-	1350	-0-	1350*
Designated	-0-	-0-	-0-	682 89	-0-	682 89*
Misc.	-0-	-0-	-0-	191 00	-0-	191 00*
Total	1308 28	1140 00	168 28*	14043 93	14820 00	776 07
Expenses						
Past Rents Sal	600 00	420 00	180 00*	1905 00	1470 00	435 00*
Organist	23 08	23 08	-0-	265 42	300 04	34 62
Tithe VFACC	130 83	114 00	16 83*	1401 85	1482 00	80 15
Tithe NEUFACC	65 41	22 80	42 61*	531 78	296 40	235 38*
Inst Min.	7 68	7 68	-0-	99 84	99 84	-0-
Rent owc.	300 00	440 00	140 00	452 50	5720 00	1195 00
Tel.	50 00	36 92	13 08*	549 50	479 96	69 54*
Church Spp.	-0-	38 4	38 4	117 99	49 92	68 07*
Postage	20 00	53 6	14 64*	108 60	69 68	38 92*
Printing	-0-	12 00	12 00	72 23	156 00	83 77
Conferences	-0-	23 60	23 60	830 00	306 80	523 20*
Honorariums	-0-	7 68	7 68	75 00	99 84	24 84
Misc.	-0-	23 04	23 04	2240 21	299 52	1940 69*
Spec. Funds	-0-	-0-	-0-	2730 00	3990 00	1260 00
TOTAL	1197 00	1140 00	57 00	15452 42	14820 00	632 42
NET <LOSS>	11 28		111 28	<1408 49>		<1408 49>

Tithable Income

Date

ATT

AMT

9/6

43

567 50

9/13

46

276 00

9/20

40

333 27

9/27

42

131 51

* Exceeds Budget

Total

1308 28

Treas. Report Sept 1981
M.C.C. Boston

Assets

CASH

Liberty

Boston St

Accts Rec.

Total

1697

14241

90699

-0-

106637

Liabilities

Accts Pay

Reserve

Surplus (Deficit)

Total

34624

142217

<70204>

Reserve Accts

Bal 8/31

in

out

Bal 9/30

Bldg Fund

90699

-0-

-0-

90699

Deacons

5172

-0-

-0-

5172

Fellowship

5451

-0-

21 00

3351

Inst Min

29727

768

-0-

30495

Social Action

125 00

-0-

-0-

125 00

Total

142217

53 East Springfield Street
Boston, Massachusetts 02114

October 1, 1981

Dear Marge,

At the last couple of Vestry meetings I have observed, and felt, the same sense of time-consuming chit chat and "beating the issue to death" that Paul Barstow vocalized. As a partial solution, to get our meetings back on the fast track, I'm enclosing the pink paper that describes a "Meeting Symphony in Four Movements" system. I'm also sharing this with the other Vestry members. It occurs to me that you may not be used to the way in which our Vestry has traditionally conducted business over the past few years. Our habits stem from our tradition of strong lay leadership and Vestry talent. The Boards in Ventura and Providence may have been more dependent upon strong Pastoral leadership and guidance, and that may be a reason why you tend to be more conversational than the fast-paced parliamentary procedure that Boston is more used to. However, the responsibility for running the meeting is shared by all of us, and I think most of us have developed bad habits that waste time.

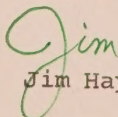
I like the enclosed suggestion that the meeting be divided into two parts: 1) information sharing; and 2) discussion and action on business. Our Vestry has tended to confuse the two, which leads to unnecessary conversation. We are circulating an agenda before we start, but I think we could take that a step further -- to read aloud (or write on flip-chart paper on the wall) all of the agenda items listed, and prioritize them. That way we decide as a group what is most important, and how much time we should talk about it; and what can be left for the end of the meeting or even postponed to the next month without causing a problem.

The other enclosures are of general interest. I particularly like "Analyzing Your Board's Effectiveness" as a tool that each of us can use at home to brush up on what we should know. It might be a good exercise for the Vestry to go through just before each congregational meeting, to make sure that every Vestry member is fully informed about all the basics.

In "The Board's Responsibility" there is talk at the end about knowing when to resign, to make way for new blood. I look forward to that opportunity. But I don't think now is quite the right time. The Vestry needs continuity and members who will donate a large amount of time; and we were not able to think of a great many congregants that fit the bill. So this time I'll be available for another term.

Thanks for all your good work, and God Bless you!

Sincerely,


Jim Hayes

INTRODUCTION

For better or worse, it is the fate of every organization that I have ever heard of to hold meetings. Often these meetings are long or unproductive or frustrating or boring or even, on occasion, all four at once. As an organization development consultant, I am frequently asked: "What can we do to improve our meetings?" I used to respond in the best tradition of process consultation by getting the meeting participants to identify what they didn't like about their meetings and what their ideal meeting would look like and then to plan ways of moving from the former to the latter. It was a slow process, to say the least.

In the meantime, like a squirrel storing away nuts for a cold winter, I was secretly answering that question for myself. Having suffered through a seemingly infinite number of grim meetings, I would have had to be some kind of masochist not to ponder a way out.

The "Meeting Symphony in Four Movements" (hereafter referred to as MSFM) is what I have come up with. It is my contribution to the dilemma posed in the question: "What can we do to improve our meetings?" Other consultants and writers have their own concept of an effective structure for meetings, and I wish to assure everyone that I did not receive mine on Mount Sinai on stone tablets. But I have field-tested it (boldly departing from the process consultation mode) in a number of organizations, and the reports have been encouraging. So I am passing it along to you with an open invitation to take it, use it, adapt it, or plagiarize it, as the situation warrants.

Why, you might ask, the metaphor of a symphony? Well, why not a symphony? For me, a symphony conjures up the image of many disparate elements combining to produce a harmonious result. The strident trumpet, the tentative flute, the mellow french horn, the dramatic timpani, the resonant wisdom of the cello--all have a role and play a part in the outcome. In both symphony and meeting success depends upon the quality of the interaction among the component parts. There are meetings that almost literally hum with efficiency, enthusiasm and general good feeling, and there are others that just grind in lethargy or warble in cacophony. In a meeting, as in a symphony, it is possible to create a masterpiece.

Why, aside from the fact that Mozart did it that way, are there four movements? Because a meeting to be complete needs four elements: 1) an agenda; 2) information-sharing; 3) discussion leading to action decisions; and 4) evaluation. The four movements, as we will see, correspond to these four elements.

SOME BASIC GROUND RULES

The MSFM structure has some basic ground rules:

- 1) Barring an earthquake or other Act of God, every meeting begins and ends on time. This is important. Starting late rewards the stragglers, punishes those who have been most responsible and creates a norm of sloppiness from the outset. It also wastes expensive time. If the convener is willing to a) negotiate the starting time to the convenience of group members and b) begin the meeting on time regardless of who is there, eventually, everyone will get the message and can be held accountable.

2) It is always appropriate for anyone in the meeting to ask:

"Is this the right group to deal with this agenda item?" The Continental Congress did not try to draft the Declaration of Independence in plenary session; it delegated the task to the Franklin sub-committee which in turn handed it over to Thomas Jefferson. Some tasks are simply inappropriate or unmanageable for large groups or are insufficiently worked up or developed. So one important way that a group protects its ability to function effectively is to judge whether each agenda item is ripe for consideration by this particular group; if not, it can be delegated for work-up to a sub-group.

3) Group maintenance is defined as everyone's responsibility, not just that of the chairperson. Is the group wandering off the subject? Has a consensus decision been implicitly reached but the conversation is still dragging on? Are some members holding a side conversation? Is one member not being heard or being interrupted or put down? Anyone who notices has the right and the responsibility to mention it and surface the process issue. When more group members are concerned with process as well as content, the odds of having a productive meeting improve proportionally.

THE FIRST MOVEMENT: BUILDING THE AGENDA

As previously indicated, the Meeting Symphony has four distinct movements. The first movement is building the agenda, which will introduce the themes of the rest of the symphony. The chairperson asks each person if he/she has any agenda items and whether each item is an information item or a discussion item. The agenda items are collected

on two separate lists and written legibly on newsprint. If advance preparation is needed on an item, it is okay to require that such an item be submitted and distributed to group members in advance of the meeting. Otherwise, I believe the advantages of building an agenda live, from the current, foreground concerns of those present outweigh any costs in terms of lack of preparation. Meetings with week-old agendas can tend to have a stale quality about them; meetings with current agendas have a better chance of feeling fresh and alive.

Once all the agenda items have been collected and written on the information item list or the discussion item list, the first movement is over.

THE SECOND MOVEMENT: INFORMATION ITEMS

The second movement consists of running through the information items. It is typically a light, rapid-paced movement, a scherzo perhaps. An information item is one in which a member either has some information he/she wants to share with the group or some information which he/she needs from the group. For an item to qualify as a purely informational item, there must not be any action-planning or decision-making involved. Questions of clarification are in order, but if any member wishes to discuss an item more fully, the item is added to the list of discussion items; the discussion is not permitted to occur in the second movement. The second movement is over when all the information items have been covered.

THE THIRD MOVEMENT: DISCUSSION ITEMS

The third movement consists of prioritizing, assigning time allocations and taking up the discussion items: it is the heart of the MSFM structure, a heavy movement fraught with peril and opportunity. A simple way to prioritize a list of discussion items is to allow group members three votes each, which they can distribute in any way they wish i.e. spend all three votes on a single red-hot item, place one vote on each of their top three items, or give two votes to one item and one vote to another item. The priority list will emerge from the vote tally. This is a relatively simple and painless process.

Next, preliminary time allocations must be allotted to the various items. If the entire meeting is scheduled to last two hours and the first and second movements have together used up 25 minutes, assuming the fourth movement will generally require about 15 minutes, there are 80 minutes available for allocation. One way to do this is to ask the author or originator of each item to make a time estimate, and if the total does not exceed 80 minutes, the task is done. If the total does exceed 80 minutes, the group might decide either to table certain items, to delegate others to sub-groups, or to reduce the time allotment requested for one or more of the items.

Of course, some discussion items will eventually require more time to complete than originally allotted. In that case, the group must decide whether to proceed on the item and from which other item to take the extra time. Unlike the second movement, in which every information item gets covered, in the third movement there is no assumption or

guarantee that every discussion item will be completed. The group simply takes up the items in their established order of priority and utilizes the time available as effectively and efficiently as possible.

As a new discussion item is beginning to be considered, the first thing the group must do is to define its objective: e.g. is the group being asked to arrive at a recommendation for action or merely to brainstorm a series of alternative strategies or options for further consideration? Is the purpose of one particular item for the group to explore all the ramifications of a proposed policy change so that the chairperson can make an informed decision or for the group actually to make the decision? Defining the objectives of each agenda item first saves the group time and wear spent on misunderstandings and unnecessary squabbles.

When either all the discussion items have been covered or all the time available for the third movement is spent, the third movement is ended by the chairperson with a minute or two wrap-up time allotted for deciding what to do with any agenda items that did not get covered.

THE FOURTH MOVEMENT: EVALUATION

The fourth movement is a way of evaluating the meeting. As such, it is in the nature of a coda or conclusionary statement. If the quality of meetings is to improve, it is important that the group make a conscious choice not to live the unexamined life. The fourth movement is thus indispensable as a commitment to continued growth and improvement.

The evaluation system employed is disarmingly simple: each member rates the meeting on a scale of 1-10. A rating of 10 would mean, "this

is the best meeting I have ever attended." Conversely, a rating of 1 would mean, "this is the worst meeting I have ever attended." Group members are asked to write down their rating so as not to be influenced by the ratings of their colleagues.

Then the ratings are published and the members are debriefed on:

a) why they chose their particular number, b) what the group did well to merit as high a number as the member gave it, and c) what would have to happen in the group to deserve a rating of 10. After each group member has addressed himself/herself to those three questions, a process which can usually be completed in 10-15 minutes, the fourth movement is complete.

As a way of concluding the meeting, the chairperson might ask if anyone has anything "for the good of the order." If not, or after any responses to that invitation, the chairperson adjourns the meeting, the symphony is over.

INTRODUCING AND IMPLEMENTING MSFM

As a manager or an external or internal consultant, it is a simple matter to introduce the MSFM, particularly if meeting participants have not been satisfied with previous meetings. If you are a manager, you can let your work group know you are going to experiment with a new meeting structure for 3 or 4 weeks and then evaluate it to see whether it has helped improve the quality of meetings. You briefly outline the MSFM structure and then actually conduct a meeting based on the MSFM model. After 3-4 meetings, you will have ample data on which to base a decision whether to continue or discontinue using the model.

If you are an external or internal consultant attending a meeting, I recommend waiting until the meeting has gotten bogged down before barely mentioning that you might just know a way of helping future meetings avoid a similar fate. Generally, some group members will beg you to share your secret and you are practically guaranteed a receptive audience. An alternative method of introducing MSFM is arranging a private session with the boss of the particular work unit, and teaching him/her the model in a coaching session. Or you might include MSFM as a segment of a training workshop in Communication, Leadership or Planning Skills and offer follow-up help on implementation.

Those are three possible ways of introducing and implementing MSFM within an organization. There are doubtless others. The main point is to understand it thoroughly and be able to explain it clearly. At that point it will be securely in your repertoire, and you can join me in helping to rid the world of grim, dissonant meetings and to create in their stead harmonious symphonic alternatives.

From Charlotte Bunch & Nancy Meyerson Class and Feminism, Diana Bress, 1974

REVOLUTION BEGINS AT HOME

**coletta reid &
charlotte bunch**

Early in the Women's Liberation Movement, I saw class as an "issue" that men in the Left used to put down feminism. Later it became an "issue" that many women said we had to discuss, but these discussions never went beyond wondering why welfare mothers weren't beating down our doors. Hours were spent beating breasts with guilt. The verdict: Women's Liberation was middle class and that's bad, but we never understood why. We never examined how our behavior created and perpetuated that kind of movement. We never looked at how working class women within our movement were oppressed.

When class became an "issue" in the development of a lesbian feminist movement in D.C., I was apprehensive. Academically, I knew that class divisions existed and

ought to be abolished, but I did not connect that to my behavior or to what was happening to women in the movement. Of course, I did not imagine that I was a class supremacist. Only after months of struggle (or should I say, fights, hostility, withdrawal, trauma...) did I begin to understand that much of my behavior came from being raised middle class and was oppressive to working class women.

I finally recognized that class in our society is not only an economic system that determines everyone's place, but also patterns of behavior that go with and reflect one's status. When middle class women carry their attitudes and ways of behaving into the movement, it oppresses working class women. Class divisions and behavior come from male dominated society and it is absurd for us to perpetuate them. If middle class women remain tied to male class values and behavior, we cripple our growth and hinder the development of a movement that can free all women. Class struggle is not a question of guilt—it is a question of change, for our movement's survival.

I come from a thoroughly middle class family (economic security, education, etc.). Coletta comes from a working class home, worked her way "up" through college and a "good marriage" and accepted middle class values that oppress working class women. From our experiences, we will describe ways that middle class women are oppressive, how we avoid class consciousness and changing ourselves, and how we must change.

Classist behavior is rooted in one basic idea: class supremacy—that the individuals of the upper and middle classes are superior to those of the lower classes. Middle class people are taught to think that we are better than working class people and we act out that superiority and self-

righteousness in a thousand daily ways. Class supremacy, male supremacy, white supremacy--it's all the same game. If you're on top of someone, the society tells you that you are better. It gives you access to its privileges and security, and it works both to keep you on top and to keep you thinking that you deserve to be there. It tells you over and over that the middle class way is the right way and teaches you how to keep that way on top--to control people and situations for your benefit. No one in our movement would say that she believes that she is better than her working class sisters, yet her behavior says it over and over again.

Class supremacy is acted out in thinking that working class women are less together, personally and politically, because they do not act and talk the way we do. Their politics may not be expressed in the same manner, their vocabulary may not be as "developed", and so they are "less articulate" and treated as less important. Or they may be hostile and emotional so one can hardly trust their political judgement; after all, we've learned to keep ourselves in check, to be reasonable, to keep things in perspective. Looking down with scorn or pity at those whose emotions are not repressed or who can't rap out abstract theories in thirty seconds flat reeks of our class arrogance and self-righteousness.

Other middle class women pull the opposite number: emotionalism, hysteria and tears when you're feeling bad and things don't go your way, or begging sympathy because it's just too hard to change. To a working class woman this constant preoccupation with one's feelings and the difficulty of changing is a luxury she could never afford. She is tired of hearing how it's really hard for you to change because your mother was neurotic, etc. while

you go on oppressing her. She had to do many unpleasant things that middle class women complain about endlessly, like exploitative jobs, just to survive. Endlessly analyzing and discussing your feelings is another way to keep control, which involves both out-talking people and using your feelings as excuses.

Sometimes a middle class woman feels superior because she believes that she worked for what she has--that her skills, education, possessions and position--come, not from her class privilege, but from hard work. I used to feel this way because I compared myself to the rich, not the poor; so, I thought that I did not have a lot to start with and had earned what I did have. By downplaying the role that privilege played in getting each of us to where we are now, we can keep on thinking that anyone can make it if they "try as hard as we did."

For example, I used to think that I had savings because of my good planning and frugality. Although I had saved a lot at a low salary, I was not recognizing that my ability to save came from my privilege--that I had inherited economic security and actual possessions to afford to live cheaply. If you think that you are where you are just because you worked hard, it is easy to become self-righteous and make classist moral judgements about others.

Often, middle and especially upper middle class women for whom things have come easily develop a privileged passivity. Someone with privilege can conveniently think that it's not necessary to fight or discipline herself to get anything. Everything will work out. Because she has made it by following nice middle class rules of life, she doesn't like for people to be pushy, dogmatic, hostile, or intolerant. Material oppression doesn't bombard her daily,

so she has the luxury and time to move slowly and may resist taking a hard political stand or alienating "anyone." She can afford to assume that most people are good and that it is unnecessary to fight or prove oneself to anyone.

Advocating downward mobility and putting down those who don't groove on it is another form of middle class arrogance. Someone who has never had to worry about eating or being acceptable can leave a job easily without knowing where money will come from, embrace patched pants and brown rice and anti-materialism as good for the soul, and treat with disdain those who are hung-up with material needs. She can usually also go back to her parents, college, or a good job when she tires of poverty. Once more, middle class women set the standards of what is good (and even the proper style of downward mobility which often takes money to achieve) and act "more revolutionary than thou" towards those who are concerned about money and the future. Often these middle class revolutionaries then live off of working class women, who haven't discarded all their property (which the middle class women may carelessly destroy) or who keep their jobs because of the fear of real poverty. This sharing is done as "revolutionary communism," but since it ignores the different class realities of those involved, it is a fuck over.

The "more revolutionary than thou" attitude is only matched in arrogance by the paternalistic social worker type who understands the "problems" of the working class woman and wants to help her out. Psychological paternalism occurs when one middle class woman explains to another that "you have to understand Mary's background and why she is so hostile." What Mary needs is for her to stand up and fight classist behavior with her

not explain away why she is the way she is. Paternalism can be benevolence in which the middle class woman gives out of personal graciousness, rather than from the recognition that she has class privileges which it is her responsibility to share. She also retains control over the access to privilege and withdraws it when she disapproves, i.e., when she is threatened. Whatever form the behavior takes, it is condescending because it assumes class superiority instead of recognizing that as women raised in the middle class we have received some useful benefits (such as money, education, skills) which we can share. It is arrogant because it accepts society's idea that privilege makes you better when, in fact, being raised middle class has messed us up in many ways which working class women can help us understand and change.

There are a lot of small, indirect, and dishonest ways of behaving that are part of being raised in "polite society" where "being nice" is at a premium. One is being indirect about anger and disapproval in destructive ways: we bitch, harp, withdraw, make snide comments, gossip, pout, etc. We make people feel our disapproval or anger but we do not say what is really on our minds.

Some of us try to smooth things over and prevent open conflict which we fear. I did this because I took conflict and anger personally and assumed that if the other person liked me, she wouldn't get angry. It was hard for me to get over an angry scene, so I tried to avoid hostility. This behavior gives the illusion that things are o.k., that you're still under control, but it is dishonest and destructive because it does not resolve problems and messes over the person who is direct about her opinions and feelings.

These are only some of the forms of classist behavior

that we have come to understand in our group. No one woman has all of these traits. On the surface many of these forms seem opposite or contradictory, but what is important is that they are all ways of maintaining the supremacy of the middle class and perpetuating the feelings of inadequacy of the working class. We are not saying that all middle class values and traits are inherently bad; many are helpful and when disassociated from supremacist use can help us all. But if we are to be able to use any of these and to develop new non-classist ways of behaving, we must examine the effects of our present behavior and how we resist changing.

RESISTANCES TO CHANGE

When working class women start confronting middle class women with their oppressive attitudes and behavior, they begin to hear a series of defenses and rationalizations that would stagger a horse. It is not helpful to defend ourselves when someone tries to point out our classist behavior. It is important to be as open as possible, to listen to the working class woman and change what she tells us. Working class women don't confront us because they get their kicks that way, but because they want to work in a movement with us and they can't do it unless we stop oppressing them.

The following are some of the ways middle class women react when confronted. None of them are helpful. If you find yourself acting in these ways, stop.

First, there are several ways to divert the issue and avoid dealing with criticism. A common diversion is denying that we are *really* middle class. Our father worked his way up, or we come from a "hybrid" family, or all those definitions of middle class don't really apply to us. Of course, this in no way deals with what the working class

woman is saying to us about our class supremacist behavior.

Or we deny that the woman criticizing us is *really* working class. She may have gone to college, or she dresses "well", or she's as articulate as we are. Anything to throw into question her criticism of us. According to this diversionary tactic, only a woman with six kids working in a factory can say anything to us about our class oppressiveness.

It is also diversionary to accuse the working class woman of denying our oppression. She's not denying that we are oppressed as women. All she is saying is that we also oppress her because of our class supremacist behavior.

Then we can always avoid the issue by demanding to know how working class women are going to bring about an economic revolution. When they start talking about our class oppressiveness, we start inquiring about their program. How will our being unoppressive help the coal miner's wife? What are they doing to alleviate the plight of Peruvian Indian women? Of course, the point of our changing is to build a movement together aimed at changing the condition of all women.

The second most common way of dealing with class criticism is the guilt trip. The purpose of criticism is to make us change not to make us feel guilty. It's not our fault that we were born middle class and breast beating about who our parents were and how we grew up isn't helpful. It is our fault, if after being told how we're oppressive, we just feel bad and guilty but continue the same oppressive behavior. Guilt makes us know we ought to be "concerned" about working class women so we add them onto the end of statements or talk about how we ought

to have more articles about "them." Guilt is not a helpful way to react to someone pointing out our class supremacist attitudes and behavior. It's just another way of not changing.

One of the most common ways of expressing guilt is to glorify the lives of women who were raised in working class homes. We talk a lot about "far out working class dykes" and wish that we hadn't been raised in the suburbs. This in no way deals with the economic insecurity and position of inferiority that working class women grew up in. It's pretty upsetting for a working class woman to look back at her own life and how she has been treated like scum, while we are telling her what an exciting experience it must have been. Then there are middle class women who put working class women on a pedestal to admire, imitate, or observe with delight. This is just another way of denying that working class women are our equals to be listened to and struggled with.

A step up from out right defensiveness and guilt occurs when middle class women begin to realize the force of criticism but are unable to deal with it politically. So we take it personally. We talk and feel as if we are being unjustly attacked, as if the other woman has no real class grievances against us but is just hostile. "Nowadays, she's just angry at me." Instead of looking at our behavior searching for anything that might be class supremacist, we assume the working class woman is being unfair to us for no reason. Generally, instead of seeking her out to find out what's wrong, we withdraw in confused "hurt" thereby protecting our classist behavior. Often we feel self-righteous because she's the hostile one. "I tried to keep up the friendship, but she just wasn't open."

Once we have a little class consciousness we don't

think that the working class woman is being unfair for no reason, but we think she has things out of perspective. Her hostility is greater than our oppressiveness warrants. We feel as if we are scapegoats, as if all her hostility from every source is directed at us. She has everything out of proportion and how can we change in such an environment?

Often middle class women react as if working class women want to take away our very identity. "They don't want us to be ourselves; they can't accept strength in anybody." We don't know if any of our behavior is any good anymore. So we become totally passive and of no use to anyone. We acceptingly listen to all criticism with apparent openness and understanding. Yet, we do nothing. Our "polite" acceptance is a passive evasion. If directly challenged, we say, "You're right but I can't deal with that now." We don't take initiative because it might be classist. This sort of passive withdrawal from the fray is a very effective way of not having to change. It indicates that we know that part of our identity is based on our middle class ways of acting. Middle class women have to build identities that are not based on our supposed superiority. The way the system has worked we have built who we are partly on whom we are better than.

Another passive reaction to class criticism goes, "Yes, I know I'm classist, and I really need you to struggle with me. Tell me every time I oppress you and I'll change."

This puts the responsibility for change back on the working class woman. We are the ones who are oppressive, so it is our responsibility to search our own and other middle class women's behavior and attitudes and to respond openly to working class women when they confront us.

We have to trust that working class women aren't just trying to tear us down, that they want us to change, that they value us as persons apart from our class oppressiveness. For sure, working class women don't struggle with those they don't care about or who they don't think will change. We can't wait for someone else to make it clearcut, totally explained and unambiguous. If part of what someone says about us seems wrong, we shouldn't use that as an excuse to dismiss it all. We have to examine ourselves, what others say and learn by risking change.

The anger of working class women towards middle class women is justified by life-long class oppression, and the class system will not be changed until middle class and working class women *both* see how oppressive it is and unite to change it. Working class women want middle class women to take up the struggle against classist behavior as their own, to stop resting on their secure middle class position. Middle class women haven't had to make the fight against classism important because we got benefits from it. We were in the superior position. Working class women want us to stop supporting the class system by accepting its middle class values, stop resting on our privileges and start confronting and challenging class oppressive behavior in ourselves and other middle class women. They do not want to be the only ones who fight against classist behavior. If they are, they might as well separate into their own movement.

Working class women also want us to use and share our middle class privileges with them--the things and skills we have because we were born into the middle class. They want us to share our money, our property, our access to jobs, our education, and our skills. Many middle class women think that downward mobility (voluntary poverty)

makes them less classist. In fact all it makes us is poorer and unable to share potentially large salaries with those who don't have the choice of voluntary poverty.

Bringing down the male supremacist system in this country will not be a possibility until we stop acting out our class supremacist attitudes on the women with whom we're building a movement.

Stages of organizational development

Developmental stage	Critical concern	Key issues	Consequences if concern is not met
Birth	1. To create a new organization	What to risk	Frustration and inaction
	2. To survive as a viable system	What to sacrifice	Death of organization Further subsidy by (faith) capital
Youth	3. To gain stability	How to organize	Reactive, crisis-dominated organization Opportunistic rather than self-directing attitudes and policies
	4. To gain reputation and develop pride	How to review and evaluate	Difficulty in attracting good personnel and clients Inappropriate, overly aggressive, and distorted image building
Maturity	5. To achieve uniqueness and adaptability	Whether and how to change	Unnecessarily defensive or competitive attitudes, diffusion of energy Loss of most creative personnel
	6. To contribute to society	Whether and how to share	Possible lack of public respect and appreciation Bankruptcy or profit loss

Directions

You are a small company that manufactures words and then packages them in meaningful (English language) sentences. Market research has established that sentences of at least three words but not more than six words each are in demand. Therefore, packaging, distribution, and sales should be set up for three- to six-word sentences.

The "words-in-sentences" industry is highly competitive; several new firms have recently entered what appears to be an expanding market. Since raw materials, technology, and pricing are all standard for the industry, your ability to compete depends on two factors: (1) volume, and (2) quality.

Group Task

Your group must design and participate in running a WIS company. You should design your organization to be as efficient as possible during each 10-minute production run. After the first production run, you will have an opportunity to reorganize your company if you want to.

Raw Materials

For each production run you will be given a "raw material word or phrase." The letters found in the word or phrase serve as the raw materials available to produce new words in sentences. For example, if the raw material word is "organization," you could produce the words and sentence: "Nat ran to a zoo."

Production Standards

There are several rules that have to be followed in producing "words-in-sentences." If these rules are not followed, your output will not meet production specifications and will not pass quality-control inspection.

1. The same letter may appear only as often in a manufactured word as it appears

in the raw material word or phrase; for example, "organization" has two os. Thus "zoo" is legitimate, but "zoonosis" is not. It has too many os and ss.

2. Raw material letters can be used again in different manufactured words.

3. A manufactured word may be used only once in a sentence and in only one sentence during a production run; if a word—for example, "a"—is used once in a sentence, it is out of stock.

4. A new word may not be made by adding "s" to form the plural of an already used manufactured word.

5. A word is defined by its spelling, not its meaning.

6. Nonsense words or nonsense sentences are unacceptable.

7. All words must be in the English language.

8. Names and places are acceptable.

9. Slang is not acceptable.

Measuring Performance

The output of your WIS company is measured by the *total number of acceptable words* that are packaged in sentences. The sentences must be legible, listed on no more than two sheets of paper, and handed to the Quality Control Review Board at the completion of each production run.

Delivery

Delivery must be made to the Quality Control Review Board 30 seconds after the end of each production run.

Quality Control

If any word in a sentence does not meet the standards set forth above, *all* the words in the sentence will be rejected. The Quality Control Review Board (composed of one member from each company) is the final arbiter of acceptability. In the event of a tie vote on the Review Board, a coin toss will determine the outcome.

Unit I

EXERCISE H

IDENTIFYING THE STRENGTHS I MAY OVERDO

ALTRUISTIC- NURTURING	ASSERTIVE- DIRECTING	ANALYTIC- AUTONOMIZING	HUB BLEND
Trusting <i>Gullible</i>	Self-Confident <i>Arrogant</i>	Cautious <i>Suspicious</i>	Flexible <i>Inconsistent</i>
Optimistic <i>Impractical</i>	Enterprising <i>Opportunistic</i>	Practical <i>Unimaginative</i>	Open to change <i>Wishy-washy</i>
Loyal <i>Slavish</i>	Ambitious <i>Ruthless</i>	Economical <i>Stingy</i>	Socializer <i>Can't be alone</i>
Idealistic <i>Wishful</i>	Organizer <i>Controller</i>	Reserved <i>Cold</i>	Experimenter <i>Aimless</i>
Helpful <i>Self-denying</i>	Persuasive <i>Pressuring</i>	Methodical <i>Rigid</i>	Curious <i>Nosy</i>
Modest <i>Self-effacing</i>	Forceful <i>Dictatorial</i>	Analytic <i>Nit-picking</i>	Adaptable <i>Spineless</i>
Devoted <i>Self-sacrificing</i>	Quick-to-act <i>Rash</i>	Principled <i>Unbending</i>	Tolerant <i>Uncaring</i>
Caring <i>Smothering</i>	Imaginative <i>Dreamer</i>	Orderly <i>Compulsive</i>	Open to compromise <i>No principles</i>
Supportive <i>Submissive</i>	Competitive <i>Combative</i>	Fair <i>Unfeeling</i>	Looks for options <i>No clear focus</i>
Accepting <i>Passive</i>	Risk-taker <i>Gambler</i>	Persevering <i>Stubborn</i>	Socially sensitive <i>Deferential</i>

Measuring Group Effectiveness

As a group begins its life and at several points during its growth, the leader and members might individually fill out the following scales and then spend some time sharing the data that is collected. Through these scales, it is possible to get a general picture of the perceptions which various members have about the group and how it is growing. It is also possible to pick up areas in which there may be difficulties blocking progress.

1. How clear are the group goals?

1	2	3	4	5
No apparent goals	Goal confusion, uncertainty, or conflict	Average goal clarity	Goals mostly clear	Goals very clear
2. How much trust and openness in the group?

1	2	3	4	5
Distrust, a closed group	Little trust, defensiveness	Average trust and openness	Considerable trust and openness	Remarkable trust and openness
3. How sensitive and perceptive are group members?

1	2	3	4	5
No awareness or listening in the group	Most members self-absorbed	Average sensitivity and listening	Better than usual listening	Outstanding sensitivity to others
4. How much attention was paid to process (the way the group was working)?

1	2	3	4	5
No attention to process	Little attention to process	Some concern with group process	A fair balance between content and process	Very concerned with process
5. How were group leadership needs met?

1	2	3	4	5
Not met, drifting	Leadership concentrated in one person	Some leadership sharing	Leadership functions distributed	Leadership needs met creatively and flexibly
6. How were group decisions made?

1	2	3	4	5
No decisions could be reached	Made by a few	Majority vote	Attempts at integrating minority vote	Full participation and tested consensus
7. How well were group resources used?

1	2	3	4	5
One or two contributed, but deviants silent	Several tried to contribute, but were discouraged	Average use of group resources	Group resources well used and encouraged	Group resources fully and effectively used
8. How much loyalty and sense of belonging to the group?

1	2	3	4	5
Members had no group loyalty or sense of belonging	Members not close but some friendly relations	About average sense of belonging	Some warm sense of belonging	Strong sense of belonging among members

Exerc

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EVALUATION FORM

A thoughtful response will be appreciated.

- 1.) What do you think was the most important outcome of this weekend?
- 2.) Were the goals and objectives of the workshop clearly defined?
- 3.) Was the design of the week-end useful in attaining the goals & objectives of the workshop?
- 4.) What concepts were most helpful to you? Least helpful?
- 5.) Were the readings useful? Which ones in particular?
- 6.) What areas should have been addressed that were not?
- 7.) If we were to do the workshop again, how would you improve it?
- 8.) Were the facilitators effective? Please comment.

Unit I

EXERCISE F

IDENTIFYING MY CHARACTERISTIC STRENGTHS (AND THE STRENGTHS I DON'T USE)

- +3 Very much like me
+2 Quite a bit like me
+1 Somewhat like me
0 Not like me

ALTRUISTIC- NURTURING		ASSERTIVE- DIRECTING		ANALYTIC- AUTONOMIZING		HUB	
Trusting		Self-Confident		Cautious		Flexible	
Optimistic		Enterprising		Practical		Open to change	
Loyal		Ambitious		Economical		Socializer	
Idealistic		Organizer		Reserved		Experimenter	
Helpful		Persuasive		Methodical		Curious	
Modest		Forceful		Analytic		Adaptable	
Devoted		Quick-to-act		Principled		Tolerant	
Caring		Imaginative		Orderly		Open to compromise	
Supportive		Competitive		Fair		Looks for options	
Accepting		Risk-taker		Persevering		Socially sensitive	
TOTAL		TOTAL		TOTAL		TOTAL	

You are inviting mutually productive and mutually gratifying relationships with others when you follow these rules for being:

NURTURANT	DIRECTIVE	AUTONOMOUS	HUB
When you genuinely want to help others and are able to do so.	When what you want to accomplish has genuine rewards for others in terms of their values.	When your pursuit of your interests is of real value to others.	When your pursuit of options is beneficial to the group.
When others' needs are real and they genuinely need your help.	When others genuinely agree with what you want to accomplish.	When others genuinely approve of your independent pursuit of your interests.	When others enjoy your efforts to get people together.
When others genuinely want your help.	When others look to you to set the goals and to give directions.	When others agree to live by the rules of principle and logical analysis.	When others look to you as a problem solver to see several perspectives.

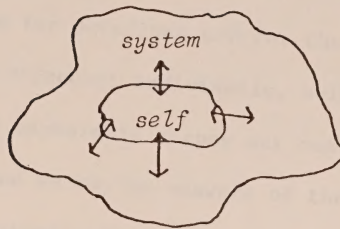
You will frequently abuse your orientation if you consistently expect others to:

Value friendship and harmony first and foremost.	Value competition and rivalry first and foremost.	Value facts and principles first and foremost.	Want the group to be together and act in consensus.
Want your help.	Want to follow you.	Be logical and keep feelings under control.	Continue to seek options when the deadline is past.
Be guided by feelings and concern for feelings.	Trust your judgement without questioning it.	Want your logical analysis and judgement.	Understand your different and unpredictable behavior.
Treat you with warmth and affection.	Treat you with admiration and envy.	Treat you with reason and respect.	Treat you as a valuable resource person.
Make your decisions for you.	Make rapid and incisive decisions.	Make only considered decisions.	Make decisions which are going to satisfy everyone.

You are imposing your values (laying your trip) on others when:

You press your help on others who don't need your help.	You tell only part of the story in order to get your own way.	You withdraw from others without any explanation.	You stick your nose in where it's not wanted.
You press your help on others who don't want your help.	You press your answers on others who don't want to do it your way.	You insist that others be independent of you and they don't want to be.	You insist on looking at one more option.
Your mission is to help the needy no matter at what personal sacrifice.	Your mission is to get the job accomplished at any cost.	Your mission is to think things through and let the chips fall where they may.	Your mission is idea-generation not commitment.
Maintaining harmony is more important than facing issues or facing facts.	Winning is more important than others' feelings or than accepting facts.	Facts and principles are more important than how others feel or what they want to do.	Group cohesiveness is more important than the group objective or goal.
You act to please others just to be likeable.	You act to direct others just to exert your authority.	You act to turn others away just to assert your independence.	You act to bring others together because you want company.

SECTION I. POWER AND POSITION



"Power is the ability to do both *what we need to do* and *what the system needs having done.*"

"When we capture the moment of power we feel the system move and we feel ourselves at the center of that movement."



"There is the difficulty to be solved, and we must do it
and solve the system which is the result."

"There is the difficulty to be solved, and we must do it
and solve the system which is the result."

CHAPTER 1

ORGANIC POWER: A SELF-AND-SYSTEM PERSPECTIVE

Whether we are in the Director, the Member or the Middle position, we are *organically* connected to the social systems of which we are component parts. In whatever position we are in, we shape these systems *and* they shape us. The choices we make and the actions we take have implications for ourselves *and* for the systems. We may think of ourselves as independent individuals, oblivious to the processes by which system membership shapes our consciousness, yet these influences are there; and we may be unaware of the consequences our actions have for these systems, yet these consequences are also there.

1. Organic power is *self-and-system-centered influence*. It is the ability to influence *our own condition* within a social system and to influence the *condition of the system itself*. Organic power differs from purely self-centered power orientations ("Power is the ability to get whatever I can for myself regardless of the consequences for the system") (See box below) and from purely system-centered perspectives ("Power is the ability to change social systems without changing myself in the process.").

ASSERTIVENESS: SELF-CENTERED POWER

"Assertiveness" is often a self-centered process. Our focus is internal. *We* feel better, *we* feel stronger, *we* feel more in control of our destiny when we are able to say "no" without guilt, when we are able to intimidate and not be intimidated, when we are able to control and not be controlled, and so forth. We succeed or fail, win or lose, and that is that. But that is *not* that. Our internal feelings may be all that we are focusing on but much else is going on in the system as a consequence of our actions, and that "much else" is worth attending to. While self-centered persons are congratulating themselves on the elegance of their assertive moves, self-and-system-centered persons are scanning the system for the consequences of such moves, looking for the next opportunity for influencing both their own condition and the condition of the system.

2. Organic power requires the ability to attend to *both* our private life experiences (What is happening to *me*? What am *I* thinking, feeling and doing?) *and* the processes of the system (What is *it* like? What shape is *it* in?).

Our so-called private experiences reveal something about us and about the system. Our feelings of frustration, boredom, anger or

fear often tell us that there is something wrong with our condition *and* the condition of the system. From an organic power perspective, these messages signal an opportunity for us to do both *what we need to do* and *what the system needs having done*.

3. Organic power is the ability to be aware of and to influence the life processes of social systems. Social systems are organic entities; they have their own life processes, and these processes may be going well or poorly. (See box below) Organic power involves the ability to recognize such processes and to influence them.

SOME SOCIAL SYSTEM PROCESSES

Sometimes the system itself is unfocused and needs focusing; and sometimes the system is focused but that focus needs to be questioned or changed. Sometimes the system is too homogeneous in form and needs greater differentiation, and sometimes the system is splintering from over-differentiation and needs integration. Sometimes system energy is low and the system needs to be mobilized, and sometimes the system is explosive and needs to be cooled down. Sometimes differences in the system are blurred and need sharpening, and sometimes differences need to be reconciled. Sometimes systems are locked in unproductive patterns of interaction and need change, and sometimes systems are flying apart in paroxysms of change and need stabilization.

4. Organic power involves the ability to recognize the *connection* between our personal condition and the condition of the system; and it involves our ability to influence one by influencing the other. In those rare moments when we *do* manage to capture the moment of organic power, we feel the system move and we feel ourselves at the center of that movement.

Organic power is not the special business of any one piece of the system. Wherever we are in the system we have information about our own condition and the condition of the system. Sometimes we limit our organic power by remaining oblivious to both or by focusing on one to the exclusion of the other. Sometimes we limit our power by failing to comprehend the connection between our condition and the condition of the system. Sometimes we limit our power by not recognizing certain choices we have or by rejecting these choices because, although they may be precisely what we need and what the system needs, they don't measure up against certain values we hold. And sometimes we limit our power by failing to take certain actions which we know are precisely what we and the system need but which we avoid because we are unwilling to face what we think will be the consequences of such actions.

As Directors, Middles and Members we have opportunities to influence system processes and our conditions within social systems.

Although there are certain power possibilities which cut across *all* positions, each position tends to highlight some possibilities more than others. When we are in the Director position there are things we can do more readily simply because we are in that position; and this holds true for the Member and Middle positions as well.

In the next chapter we will look at the special organic power opportunities associated with the Director, Member and Middle positions, and we will describe some of the ways in which these power opportunities are often dissipated.

Chart 1. Power and Powerlessness in the
Director, Member and Middle Position.

Position	Organic Power Opportunities	Central Processes	Low Power Patterns
Director	Focusing and channeling system energy.	Managing the tension be- tween change and stabili- zation.	1. Understructuring 2. Overstructuring
Member	Enriching the system's visions and structures; and shaping, modifying or changing its visions and structures.	Going with the system as it is <i>and</i> rebelling against the system as it is.	Being stuck on <i>either</i> participation <i>or</i> rebellion.
Middle [Committee]	Influencing the Director/Member commu- nication and interaction patterns.	<u>Responsiveness to both</u> Directors <i>and</i> Members, and <u>Independence</u> from both of them.	Being Stuck-Up Being Stuck-Down Being Stuck-in-the- Middle

SECTION II. SELF-LIMITING POWER STYLES:

ISSUES OF VALUES AND PERSONAL CONTROL

Organic power involves the ability to recognize the unique possibilities available in each social system situation, and it involves the ability to interact with our systems in ways that capitalize on these opportunities.

The more "stuck" we are on certain values that limit the range of what we consider to be "appropriate" actions, the less likely we are to both recognize and capitalize on many of these opportunities. The relationship between value commitment and power is the subject of Chapter 3.

And sometimes our responsiveness and flexibility are limited not by our beliefs regarding what is right or wrong, appropriate or inappropriate, but by our inability to interact comfortably within our system environments. At such times we are more concerned with protecting ourselves from system interactions than with seeing and doing what we need to do and what the system needs having done. The relationship between personal control issues and power is the subject of Chapter 4.

CHAPTER 3

PERSON-PRIMACY AND SYSTEM-PRIMACY: TWO VALUE ORIENTATIONS
AND THEIR CONSEQUENCES FOR ORGANIC POWER

<u>Position</u>	<u>Person-Primacy</u>	<u>System-Primacy</u>
Directors	Democrats	Autocrats
Middles	Liberals	Loyalists
Members	Individualists	Good Soldiers

"The more firmly entrenched our value systems, the more predictable our patterns of diagnosis, the more narrow our range of options, and the more limited our opportunities for exercising organic power."

VALUES: STRONG SIDES AND BLIND SIDES

Power is the ability to respond to the realities of a given situation. Sometimes, however, our ability to respond to what is happening in the system is limited by certain implicit or explicit assumptions we make regarding what are and are not appropriate actions for us to take. The more firmly entrenched these assumptions are, the more likely we are to recognize and exercise certain options while being blind to or rejecting others *independently of the appropriateness of these options to what is going on within the system*. When these values are firmly entrenched, our patterns of diagnosis and action are

predictable, our range of options is narrow, and our opportunities for exercising organic power are limited.

In this chapter we will explore two clusters of assumptions and values common to social system life: a System-Primacy value orientation in which the survival and growth of systems takes precedence over the freedom of individuals, and a Person-Primacy value orientation in which the freedom of individuals takes primacy over the survival and growth of systems. We will explore the consequences firmly entrenched values in either direction have for limiting the power potential of the Director, Middle and Member positions.

System-Primacy: Autocrats, Loyalists and Good Soldiers. Sometimes we believe that the survival and growth of our social systems takes primacy over the freedom of individual members within those systems. When there is tension between maintaining, protecting and strengthening the system on the one hand, and encouraging member freedom on the other, our tendency is to support the system. (See box below for a description of beliefs and feelings associated with a System-Primacy value orientation.)

System-Primacy: System Strength
Over Individual Freedom

As System-Primacy-oriented people:

- We identify closely with our social systems -- our organizations, families, nations, sports teams; when they are strong we feel strong, when they are weak we feel weak.
- We believe in preserving our systems and in making them stronger.
- We respond to attacks on our social systems from within or without as attacks on ourselves.
- We value the traditions of our systems; they offer a sense of continuity and permanence.
- We dislike changes in our systems' traditions, forms, and institutions; we feel that such changes weaken the system or transform it into something other than the system we value.
- We feel that system members who complain about our systems, who attempt to change their form and direction, or who leave them, are dangerous, disloyal, ungrateful, and unrealistic.

Directors, Middles, and Members with firmly entrenched System-Primacy values are oriented toward keeping their systems strong, toward preserving existing institutional forms, and toward protecting the system

from internal and external attack. All of these processes at times serve the system well. Yet, the more firmly entrenched these values are, the more vulnerable such Directors, Middles and Members are to their own blind sides -- to ignoring certain processes which would in fact strengthen their systems and to continuing to pursue processes in the name of System-Primacy which weaken these systems.

System-Primacy Directors (Autocrats) are less likely to modify existing system visions and structures even when the long-term well-being of the system requires such modification; System-Primacy Middles (Loyalists) are less likely to support Members' calls for change even when the long-term well-being of the system requires such support; and System-Primacy Members (Good Soldiers) are less likely to confront the system, to challenge existing visions and structures even when the long-term well-being of the system requires such confrontation and challenge. (See Chart 2 for a summary of the orientation of Autocrats, Loyalists, and Good Soldiers.)

Chart 2. Orientations of Autocrats, Loyalists, and Good Soldiers

System-Centered Slogans	Behavior Patterns of Directors, Middles and Members			Weaknesses In The System That Are Ignored, Denied or Defended	Reactions to Legitimate Efforts To Change These System Weaknesses
	Style	Tendency	Blind Side		
"KEEP OUR SYSTEMS STRONG" "PRESERVE OUR INSTITUTIONS AND TRADITIONS" "PROTECT US FROM OUR ENEMIES" "LOVE US OR LEAVE US"	Autocratic Directors	Over- Structuring	Adapting Visions and Structures to Meet Current Realities	Visions which are inappropriate, unethical, narrow, destructive.	Such change efforts are seen as:
	Loyalist Middles	Stuck-Up	Maintaining A System Per- spective Inde- pendent Of That Of Directors; Confronting Directors in Support of Members		Insubordinate
				Structures which fail to channel member energy.	Disloyal
					Anarchistic
				The inability of system to adapt to changing conditions.	Trouble-Making
					Divisive
	Good Soldier Members	Stuck On Participation	Confronting, Questioning, Challenging Existing System Visions and Structures		And such efforts are:
					Ignored or
					Squashed

How To Weaken Systems By Keeping Them Strong. It is paradoxical that Autocrats, Loyalists and Good Soldiers, in their efforts to preserve and strengthen their social systems, often act in ways which weaken those systems. They insist on maintaining existing system forms and participating in these even when these forms are externally destructive, self-destructive, unnecessarily confining of system members, and unconnected to major sources of member energy. Rather than being flexible to respond to specific situational conditions, they are stuck on limited patterns of response independently of the appropriateness of these patterns to current conditions. Autocrats tend to be stuck on overstructuring; Loyalists tend to be stuck-up; and Good Soldiers tend to be stuck on participation. The more intensively they struggle to maintain *what is* when *what is* is no longer appropriate, and the more completely they shut themselves off from changing system conditions, the more vulnerable they are to weakening those systems they are committed to keeping strong.

Person-Primacy: Democrats, Liberals and Individualists. Sometimes we feel that the freedom of individuals within a system takes primacy over the survival and growth of that system; and, when there is tension between supporting the individual rights of members and maintaining, protecting and strengthening the system, our tendency is to go with personal freedom. (See box below for a description of beliefs and feelings associated with a Person-Primacy value orientation.)

Person-Primacy: Individual FreedomOver System Strength

As Person-Primacy people:

- We respect the rights of individuals to feel, believe and live as they choose, and we resent and resist systemic pressures on individuals to conform to some acceptable pattern.
- We believe that system identification is constraining, that it limits our freedom and our possibilities for development.
- We believe in the possibilities of continual self- and system-improvement, and we feel that loyal and patriotic adherence to tradition stands in the way of such improvement.
- We tend to be suspicious of authority and feel that respect for authority is not a given but something which must be earned.
- We believe that hard-core system patriots (Autocrats, Loyalists and Good Soldiers) are irrational, primitive, oppressive and destructive.

- We believe that personal freedom takes primacy over system loyalty, and that loyalty and patriotism often lead to consequences which are destructive internally and externally.

Directors, Middles, and Members with firmly entrenched Person-Primacy values are primarily concerned with freedom and individuality for themselves and for others, and with protecting themselves and others from the encroachments social system membership makes on that freedom and individuality. At times this orientation serves the system well. Yet, the more firmly entrenched these values are, the more vulnerable such Directors, Middles and Members are to their own blind sides -- to ignoring certain processes which would encourage the growth and freedom of individuals, and to continuing to pursue processes in the name of Person-Primacy which limit that freedom and growth.

Person-Primacy Directors (Democrats) are less likely to develop and maintain system visions and structures even when those visions and structures are what individuals within the system need in order to recognize and realize their unique potentials; Person-Primacy Middles (Liberals) are less likely to support existing visions and structures and to confront Members even when the freedom and long-term self-interests of individuals would be served by such support and confrontation; and Person-Primacy Members (Individualists) are less likely to participate within system visions and structures even when their own personal liberation and development would be served by such participation. (See Chart 3 for a summary of the orientation of Democrats, Liberals and Individualists.)

Chart 3. Orientations of Democrats, Liberals, and Individualists

System-Centered Slogans	Behavior Patterns of Directors, Middles and Members			Weaknesses In The System That Are Ignored, Denied or Defended	Reactions to Legitimate Efforts To Change These System Weaknesses
	Style	Tendency	Blind Side		
"FREEDOM!" "THROW OFF THE SYSTEM CHAINS THAT SHACKLE YOU!" "DO YOUR OWN THING!"	Democratic Directors	Under- Structuring	Creating System Visions and Structures; Confronting Resistance To System Visions and Structures	Apathy Aimlessness Structural Looseness: Failure To Honor Agreements Failure To Keep Appointments Uneven En- forcement Of Laws, Rules, And Regulations Chaos Leaders Who Don't Lead and Followers Who Don't Follow	These are seen as: Oppressive Confining Totalitarian Fascist And such efforts are: Ignored or Squashed
	Liberal Middles	Stuck-Down	Maintaining A System Perspective Independent Of That Of Members; Confronting Members In Support Of Directors		
	Individualistic Members	Rebellion; Peripheral Membership; Dropping Out	Participation: Going <i>With</i> The System.		

The Freedom To Be Nothing and To Go Nowhere. It is paradoxical that Democrats, Liberals and Individualists, in their commitment to preserving their own freedom and the freedom of others, frequently conspire in generating and tolerating the most unliberating conditions. Their basic assumption -- that system structuring and the maintenance of structures are inherently constraining processes -- is a false one. (See box below) System membership is *both* enabling *and* constraining. It offers us the opportunity to realize our potential in certain directions, and it inevitably limits our development in other directions. Person-Primacy people tend to be stuck on the constraining portion of the equation -- Democrats are stuck on understructuring, Liberals are stuck-down, and Individualists are stuck on rebellion, dropping out, or peripheral participation -- and as such they tend to deprive themselves and others of the freedom, satisfaction and development that come with focusing energy within disciplined boundaries.

Structuring: Who Is Doing

What To Whom?

Structuring is not necessarily something we do *to* others; it can also be something we do *for others*. This is a difficult statement to make in civilized company since the cornerstone position for every fascist philosophy is: "We are doing it for *their* own good." Yet, just as we are often deluded in thinking that we

are doing things for others when in fact we are not, we are also often deluded in believing that the best thing we can do for others is to do nothing.

Liberating Structures. Some structural relationships are so liberating that it is unclear who is doing what to whom. In such cases Directors do not appear to *impose* their visions on Members but to tap a vision already existing in these Members, a vision which was not being realized, a vision in search of a structure. In such instances we do not feel constrained by such visions and structures. We feel liberated by them. Someone has made it possible for us to do what we wanted to do but had no medium for doing.

Even Constraining Structures Can Be Liberating. There are also structural relationships which do not *feel* liberating but which in fact are. We feel constrained by such structures; we do not choose them; we want out. Yet the structures *do* focus our energy and, in that tension between going along with structures and bursting out of them, we use resources we had not been using and we develop resources we would not otherwise have developed. We grow.

From the Member perspective, when we are in a structure which feels constraining, when we are not doing what we want to do, we often feel that freedom would be best for us. If only we could get out, if only we didn't have to do what we didn't want to do, then we could start to live and grow. And sometimes we are right. Sometimes the structure is inappropriate for us -- someone is trying to grow apples when in fact we are tomatoes -- and sometimes these external pressures and constraints destroy our confidence in our own intuition and judgment; but the point is that feelings of constraint, resentment against the structure and those who enforce it, and the yearnings for freedom are not themselves sufficient indicators of the inappropriateness of the structure. It may *still* be good for us. In addition to asking "How do we *feel* about structures?" there is the question "What have we become as the result of interacting with these structures?" And sometimes we are pleased with what we have become while continuing to feel negatively both to the structures and to those who imposed them on us.

We limit our power potential to the extent to which we are locked on either System-Primacy values or Person-Primacy values. In either case we blind ourselves to many options; we are so sure about what is the *only true way to go* that we are unable to open ourselves to experiencing the unique realities of each new situation. In the following chapter we will explore other behavior patterns which also limit our power potential: those involving problems of self-control.

FINAL EXAMINATION

This examination will require an integration of assigned readings, class presentations, and your own thoughts. It is to be done at home and returned to the Chapel Office not later than 5 p.m. on May 4th.

Please do not share or discuss the questions with any other persons until you have submitted the exam to the Chapel Office.

Write on five out of the eight questions. At least two typed pages should be required to adequately cover each question. Please read the questions with care and make your answers as specific as possible in response to that question.

- ✓ 1. Briefly outline your current theology of the church and indicate in what ways the concepts of administration are important to and part of that doctrine.
- ✓ 2. Indicate in specific detail the ways in which a parish might formulate and carry out its program: starting with statement of purpose, goals and objectives, specific program plans, and evaluation.
- ✓ 3. Compare and contrast the understanding of "systems approach" to church administration as found in Pattison and Lindgren and Shawchuck.
4. Describe your understanding of the authority of the pastor, and indicate the ways in which your understanding of authority contrasts to the concept of authority presented by the instructor.
5. Discuss the central concepts of stewardship in the life of a local parish and indicate the ways in which the specific financial operations spring from those concepts.
- ✓ 6. Describe what you now believe to be the most efficient leadership style for pastors in parish settings and contrast that to your own style as you see it.
- ✓ 7. Case Study on Building Usage: "You have just been appointed/called as the pastor of an old church in a mid-size town (ca 20,000). The building is large and centrally located. The congregation tends to be conservative on social issues. A small group of citizens, which include one very active young couple in your church, ask to use the building for a day-long seminar on militarism and the draft. You know that the citizens group has tended to oppose both in the past and that their stand is not popular in the community or the church. There are no schedule conflicts in the use of the building."

Describe the process of your analysis and decision in granting/rejecting this request. Indicate your basis of authority, the groups with whom you might talk, those who might vote, and the final outcome. Make up details if necessary, so long as they do not conflict with the basic description.

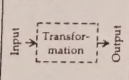
8. What principles should guide your use of time in doing your work? What methods can carry out these principles in the most effective manner?

All written work must be submitted not later than 5 p.m. on Tuesday, May 4, to the Chapel Office. This includes papers and reading responses.

Management for Your Church

ORGANIZATIONAL

THEORIES

THEORY and Symbol	DESCRIPTIVE ORGANIZATIONAL AND THEOLOGICAL TERMS	CONCEPT OF ORGANIZATION	DECISION-MAKING PROCESS	LEADER'S FUNCTIONS AND STYLE
TRADITIONAL 	Organizational: Patrimonial Theological: "The People of God"	Maintaining a tradition.	Made and announced by the elders. Unhurried pace.	To maintain the tradition and preserve the status quo. PATERAL PRIESTLY
CHARISMATIC 	Organizational: Intuitive Theological: "The new creation"	Pursuing an intuition.	Spontaneous, unpredictable proclamation by leader.	To lead and motivate through personal appeal. PROPHETIC INSPIRATIONAL
CLASSICAL 	Organizational: Bureaucratic Theological: "God's Building"	Running a machine.	Issuance of orders from the top; conscious, rationalized, calculated.	To direct by handing down decisions. AGGRESSIVE DIRECTIVE
HUMAN RELATIONS 	Organizational: Group or democratic Theological: "The Fellowship of Faith"	Leading groups.	Group decision through informal, intimate, and fluid relationships.	To create an atmosphere conducive to expression and participation. SENSITIVE NON-DIRECTIVE
SYSTEMS 	Organizational: Organic Theological: "The Body of Christ"	Adapting a system.	Continuous adaptation with purpose kept relevant to environment.	To clarify goals, interpret environment, and monitor change. PROFESSIONAL ACTIVATOR

In reviewing the matrix it is important to keep in mind that there are no pure examples of any of the theories in actual practice. Each denomination and local church will possess elements of most, if not all, of the theories. However, each denomination or local church tends to be predominantly influenced by one of the theories, so that it might be said to have a preferred organizational theory with elements of the others.⁴

We encourage you to take a few minutes to identify your preferred organizational theory and any elements of the

The Influence of Organization Theory

COMPONENTS

STYLES OF CONFLICT MANAGEMENT	RELATIONSHIP TO ENVIRONMENT	VIEW OF "PERSONS"	COMMUNICATION PATTERN	GOALS
Rejecting and ignoring forces which threaten stability or the status quo.	Rejection of external change to maintain status quo.	Persons are secure in the status quo; little initiative is expected.	Leader transmits heritage, expecting unexplicit consent.	Generally assumed and seldom articulated.
Welcoming challenge; thriving on conflict.	Rejection of the status quo; articulation of changes.	Persons are active and capable, but need constant direction and intervention.	Leader announces the content of intuition; he and his followers are bound to obey.	Highly explicit, reflecting the philosophy and aims of the leader.
Bringing about submission to authority through domination or appeal to written policy.	Resolution of tension with environment by domination or cooptation.	Persons need controls and prefer direction.	Leader issues detailed directives; most communication is downward from the top.	Objective and quantitative; arrived at by hierarchy and handed down.
Resolving conflict through compromise.	Respect for and fluid relationships with the environment.	Persons learn to seek and accept responsibility when properly motivated.	Leader encourages individual participation and contribution; the group shares.	Subjective rather than objective; purposes of the group emerge from discussion.
Integrating conflicting elements of conflict to achieve benefit therefrom.	Attuned to changing environment; adaptive, flexible relationships.	Not all have same skills & knowledge. Can be motivated through goal clarification, enablement and effectiveness.	In all directions, through open channels and "linking" persons.	Definitive and unifying, with consideration for environment.

others you are attempting to put into practice in your ministry. You can do this by returning to the chart to conduct a self-analysis as follows:

1. Place a card over the three left-hand columns, which deal with theoretical issues.
2. Read down each of the seven columns of Organizational Components, and encircle the one statement in each column that is most descriptive of your own preferences regarding that particular component.
3. Remove the card to see which organizational theory you

